



FUNERAL
DIRECTORS
LIFE

From Handwritten to Handled:
**TRANSFORMING
HANDWRITTEN
WORKFLOWS**
With **AI**

Grooper®

Funeral Directors Life (FDL) has a simple mission: make the lives of funeral directors easier with their many customer service solutions, including technology solutions. If FDL could simplify the everyday tasks of funeral director staff, then funeral homes can spend more time on helping families in need, which grows their businesses.

So FDL is continually looking for ways to offer better customer service, reduce errors, and cause more funeral homes to use their solutions.

PROJECTED RESULTS: _____

- Over \$1 Million saved in one year in onboarding costs
- Over 1,900 hours of tough manual data entry eliminated every year
- 10 to 20 minutes of painstaking manual data entry saved per funeral



A Contract Processing Problem

One area that FDL focused on is automating their contract processing. FDL's integration with funeral home case management software, Passare, enables funeral homes to manage every family's contract, even down to line-item information.

All data from digital contracts is easily integrated into Passare. But FDL was relying on manual data entry for the handwritten contracts, which make up about 25% of all their contracts.

This Created Several Problems



Time

It took FDL staff about eight minutes to manually type in data from one handwritten contract into the insurance administration software.



Minimal data

FDL staff only had time to key in totals, and not line items, off handwritten contracts. So funeral homes couldn't get a comprehensive view of their data from many of their contracts.



Errors

By manually keying in data, there is a higher chance of errors and incorrect contract data in Passare.



More time

If funeral home staff wanted a full understanding of handwritten contracts, they were forced to key in the line-item data into Passare.



Inconsistent software experience

Funeral home staff had an inconsistent experience in Passare, based on whether the contract was digital or handwritten.

To solve these problems, Kyle Swearingen, VP of Development for FDL, turned to automation. But the toughest part of the project was finding a quality handwriting recognition solution.



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- Kyle Swearingen
VP of Development for FDL

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Picking Grooper for “A Million Different Reasons”

Swearingen considered four different intelligent document processing software and was even close to signing a contract with one of them.

However, during that time, Swearingen learned about Grooper at a technology conference. He became very interested when he learned about Grooper’s cutting-edge handwriting recognition capability and easy integration with Hyland products (specifically OnBase). The Hyland integration was much tougher with the other options.

“Being able to quickly export directly back in OnBase was huge. Being able to custom organize everything, especially on a very large scale, is a big benefit,” said Swearingen.

He was also interested in Grooper’s web browser user interface, on-prem capabilities, and customization.

“Grooper being on-prem and web-based makes it much easier to deploy. And I just have more control over what I want to do with Grooper,” said Swearingen.

“There were a million different reasons why we picked Grooper.”

Setting Up the Handwriting Solution

After choosing Grooper, Swearingen quickly came up to speed through Grooper University, the online training resource that offers 21 unique courses to help Grooper users tackle any project.

"I've enjoyed Grooper's training. It's gotten me to the point that I feel like I'm a Grooper expert now. Your training is worth the price," said Swearingen.

To tackle handwritten contracts, Swearingen and his team integrated four different pieces. First, Grooper extracts data from scanned handwritten contracts. OnBase then uses that data to create a task for RPA, which enters data into the insurance administration system.

But how would FDL measure if they really were decreasing errors from handwritten contracts? FDL used WorkView, Reporting Dashboards, and the Grooper API to compare the data captured from handwriting recognition automation to the data that was manually keyed into their insurance administration system.

Swearingen was then able to learn how much data FDL had entered manually, check accuracy, and optimize OCR handwriting configuration.

"I have 20 different types of documents with a lot of handwriting on them. But we're reducing the time it takes to key a contract, and we're capturing more data. It's a huge time saver."

The Fantastic Outcome

The first day that the project was live, Grooper was accurately recognizing 80% of the handwritten contract data. The FDL New Business Team only had to enter 20% of the contract data. This was a huge improvement as they were capturing far more contract data while also greatly decreasing the time spent on manual work.

Per contract, the time spent on manual data entry from handwritten contracts decreased from eight minutes to only two.

Swearingen projects they will save 1,920 hours every year, and the time saved is expected to grow every year. If FDL were to process all data on handwritten contracts manually, it would require 4.5 more employees and an extra \$1,000,000 annually. But FDL has saved all of that with this automation solution.



Valuable Time Saved for Thousands of Customers

FDL is now saving their funeral homes about 10 to 20 minutes of painstaking work for each funeral. Also, the customer experience in Passare is now consistent, as funeral homes have all data available whether it was a handwritten or digital contract.

"This allows them to focus on the family in need and not on the monotonous data entry," said Swearingen. "They get to do what they do best, serve the families in need."

Grooper's handwriting recognition has proven to be a valuable component in this improvement.



"The document capture side of things can be a nightmare to solve because I have 20 different types of documents with a lot of handwriting on them. But we're reducing the time it takes to key a contract, and we're capturing more data. It's a huge time saver," said Swearingen.



For more information on Grooper's handwriting recognition, visit **Grooper.com**. Or contact us at **bisok.com/contact**