7 Steps for Digitizing Insurance Content

Audit Content
Review your existing content and archive inaccurate or outdated documents. You should only digitize content that is relevant.

Go department by department
Digitize one department's content before moving on to the next. This will keep the project more organized and streamlined.

Set realistic timelines
Insurance companies are powered by policy wordings, underwriting manuals, job aids, and more — that's a lot of content. Set realistic deadlines for your digitizing project to stay on track.

Select scanning methods
A combination of scanning documents with a physical scanner or mobile application will be your best bet here — just make sure you're handling your insureds' personal information with care. If you have a large volume of documents to handle, you can outsource the job to a scanning service.

Upload documents to your knowledge management system
All digitized documents should live in one place. Upload content to your knowledge management system and set user permissions so the right people can access them.

Give the document a clear and straightforward title
Provide each document with a clear and straightforward title. That way, anyone from a claims adjuster to a call center agent will be able to access the same document.

Encourage team members to create content digitally
Regularly check in with team members to ensure all content is digitized and uploaded to your knowledge management tool. This will help preserve institutional knowledge for years to come.