



# Long Term Care Associates slashes manual data entry time by 80 percent

Wielding Captricity's speed to render manual data entry obsolete for a key segment of their prospect pool

By harnessing the power of automated data capture and transformation in the cloud, Long Term Care Associates (LTCA) has been able to reduce the time spent on manual data entry for their direct mail marketing program by 80 percent, while reducing processing turnaround time and maintaining accuracy.

As specialists in the long-term care insurance space, LTCA markets their products and services through a number of channels, including independent agents, wholesaling and retail. Several marketing approaches are used, including email outreach and pay-per-click. In the retail space, LTCA leverages direct mail marketing campaigns to yield 25 percent of the company's sales prospect pool.

## THE INDUSTRY:

Insurance (Long-term Care)

## THE PROBLEM:

- Need to simply and quickly boost the power of the direct mail response program
- Need to manage spikes in lead generation activity
- Need to optimize talent productivity

## THE SOLUTION:

Captricity's cloud-native Data-as-a-Service platform quickly captures and transforms handwritten and machine-typed response card data into actionable sales leads.

## THE ROI:

- Cut response form data entry time by 80 percent
- Reduced response card processing turnaround time

## In need of a speedy data capture process to make the most of new leads

For LTCA, time is of the essence when dealing with direct mail program responses. The data generated from every prospect who returns a form or reply card by mail should be actionable almost immediately upon receipt. LTCA required a way to effectively distill that data – most of which was handwritten -- into a digital format so it could be used with their CRM software to rapidly generate leads.



Before adopting Captricity, LTCA would either manually enter reply card data into a custom database, or photocopy the reply card on a lead form and send the copy to an agent by email or fax. LTCA needed a system that would automatically digitize and sort reply card data and push it directly into Salesforce, their CRM of choice.

While Salesforce was ideal for the data generated by LTCA's digital marketing efforts, the marketing lists used for their direct mail programs would often have incomplete or missing information and required significant manual transcribing. According to LTCA co-founder and Senior Vice President, Gary Forman, "Once we had the CRM we knew there were probably some better solutions out there waiting for us."

## Scalability saves time and labor costs

As a small company with a lean and powerful operations staff, LTCA operates at a high level at a lower overall cost by employing the latest in technology to continually optimize their performance. Because LTCA requires solutions that save time, are highly scalable and easily integrated into existing systems, Captricity was an ideal fit.

LTCA recognized that a platform that simply turned the data around quickly would be insufficient; the data also needed to be quickly dropped back into the sales records to enable field agents to pursue prospects while they were still hot.

Spikes in response rates were also a concern. High return rates from large mailings impacted the marketing department's ability to quickly handle the data, causing time management difficulties. Automating the data entry process with Captricity solved those issues.



### LTCA + Captricity = Agility

While attending an ILTCI event, LTCA was introduced to Captricity's data capture technology and immediately recognized its applicability to their direct mail program.

## Painless integration and ease of use maximize staff performance

"In our market space there are a lot of companies that have more employees, but not a lot of them do as much business as we do," Forman said. "We want things to be smooth and easy and not burning a lot of time on troubleshooting because we all do a lot of things. Anything we can make easier at the end of the day or fully automate are of value." Captricity's ability to integrate seamlessly with Salesforce was a key benefit. Forman described the integration process as "fast and painless."



By improving turnaround time, reducing cost and freeing up marketing staff for higher value activities, Captricity is helping LTCA to broaden their outreach and increase new business. “If you have good people and give them good tools like the Captricity platform, you can get a lot done without a lot of people,” Forman noted.

“Captricity helps insurers of all sizes to streamline their workflows and make the most of their talent,” said Tim DaRosa, Vice President of Marketing at Captricity. “Our solutions increase efficiency, accuracy and speed, enabling insurance companies to grow while keeping pace with industry and market fluctuations. Our relationship with LTCA also reinforces the continuing value of direct mail marketing in the insurance sector, and is a great source of gratification for us.”

For more information on how we help insurance companies improve their marketing efforts by eliminating manual data entry, click below.

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