

## Kwik Fit Insurance Case Study



**A top financial services firm uses online proofing to simplify design review & regulatory compliance**



*Kwik Fit Insurance (KFI) is a Glasgow-based insurance broker, primarily covering the car and home markets. It is one of the UK's leading insurance brokers, winning multiple awards including The Sunday Times' "100 Best Companies to Work For" and the "Investment in People Award" at the UK Broker Awards. KFI employs more than 1,000 people, selling policies mainly through its website and a call center. The call center handles more than 10 million calls each year.*

*The KFI Compliance team review and approve between 50 and 100 documents per month. The wide range of marketing projects include web pages, emails, online banners and text messages. It must also approve policy documents such as car insurance contracts. Because all materials are subject to strict regulatory compliance standards, KFI must keep an accurate audit trail for each project. Senior Compliance Advisor Lesley Mathieson talks about KFI's workflow and the problems caused by outdated proofing methods.*



Our freelance designer creates a design for a piece of marketing content or a policy document and sends it to the marketing department for a review to make sure there are no errors. From there, it is passed to the compliance team for approval. If amends are required, we will work with the designer, and send comments back and forth. For other projects, we might work directly with the marketing department regarding any errors.



## The Problem

“It was extremely difficult to keep track of changes”

We previously used email to communicate and send the documents back and forth. Documents would often be in a Microsoft Word format and we would just use the ‘track changes’ function to highlight the sections we wanted changed. Sometimes we would use eCopy PaperWorks, which recorded changes in a variety of formats but did not have all the functionality we needed. After reviewing a document, we would allocate it to a number in a spreadsheet and email the document back to marketing.

It was extremely difficult to keep track of changes this way. If we needed an audit trail, it was cumbersome to go back into emails and see what a particular comment was or who made an approval. If a document was approved, it was tough to go back and find the document to begin with. To make things worse, if I happened to be out of the office that day, my email was not available for anyone to look at. It was a highly inefficient way to get things done.



## ProofHQ Solution

“The main thing was efficiency”

We needed a tool that would make our review process much simpler. For us, the main thing was efficiency. Reviewing and approving marketing material took a large amount of time and effort for what should have been a simple part of our job. We have other work that needs to get done and a small team doing it, so we were looking to make this process as effective and efficient as possible. That way we can then get to the other work rather than employing an additional set of hands. We had to work smarter and save some time in the process.

With ProofHQ it was much easier to review documents. Just being able to use a few tools to highlight and show how you want to move things about on a page, made this process much simpler to manage. We can leave comments directly on the document rather than going into Word and using ‘track changes’. And we no longer have to rely on email to discuss designs and approval. Everything is done in ProofHQ. It gave us a ‘one-stop shop’ for our review and approval tasks.



## The Results

“Our process is much more slick”

ProofHQ has really freed us up. With Word documents, spreadsheets and emails, it was quite laborious having to log into everything to see what we have done. Now that everything goes through ProofHQ, our process is much more slick. Now we can just hit a button to see if a document is approved or not approved and then quickly move on to the next job.

What is also very critical for us is that our review and approval process is more auditable. One of our responsibilities is to evidence the approval process for marketing materials as well as policy documents. Because ProofHQ archives all comments and decisions, it's easier to retrace each step, which helps us meet compliance and audit requirements.

## About ProofHQ

ProofHQ is an online proofing solution for marketing teams of any size in any industry who need to deliver marketing projects faster and more efficiently. Unlike email and hardcopy proofing, ProofHQ enables review teams to collaborate simultaneously on creative content. ProofHQ streamlines approval workflow and can be used across all media including print, digital and audiovisual. It measurably speeds up project delivery and significantly reduces management time, revisions, errors and costs.

[www.proofhq.com](http://www.proofhq.com)