



Success story

The Unum Group - Unum UK

Industry

- Insurance

Solutions

- OpenText Exstream™
- OpenText Exstream™ LiveEditor
- OpenText Exstream™ Engine as a Web ServiceOpenText Exstream™ High-Volume Delivery

Results



Generates fivefold efficiency gain in document production by replacing manual effort with automated processes



Reduces custom code and other complexities of IT environment



Eliminates need for many document templates, increasing agility for change

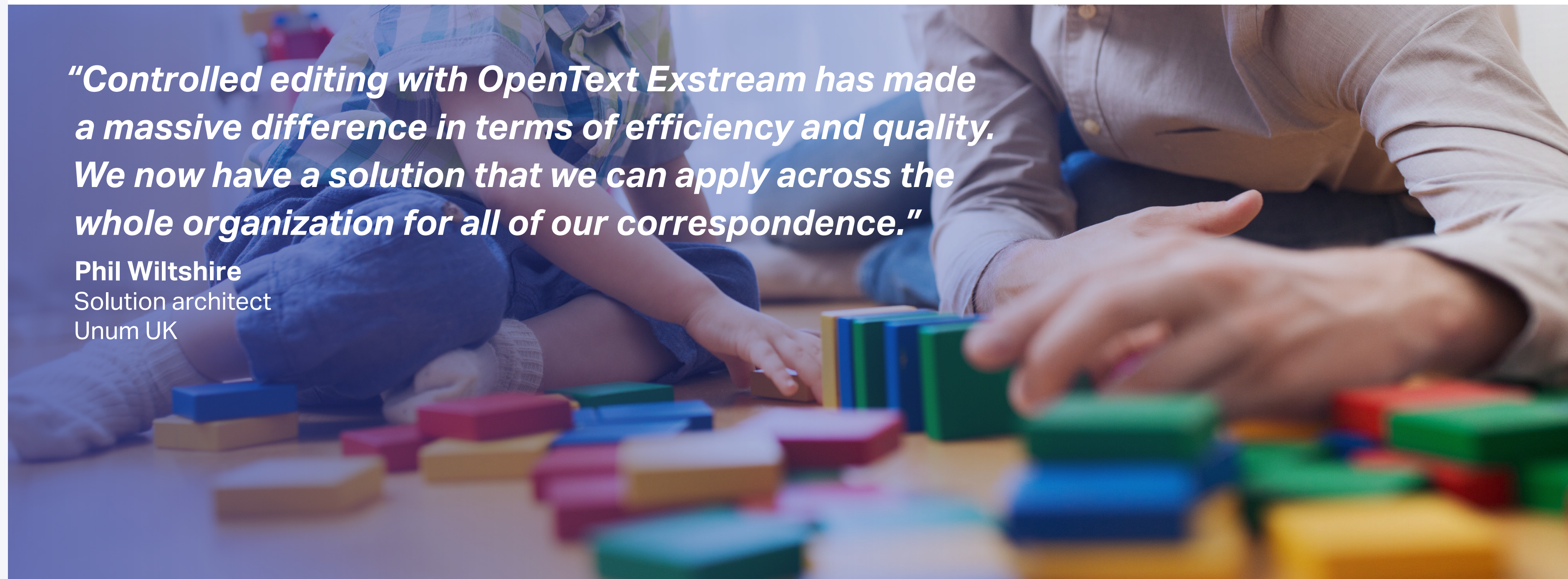


Unum UK implements controlled editing for increased efficiency

OpenText Exstream continues to meet customer communication needs of leading insurer

"Controlled editing with OpenText Exstream has made a massive difference in terms of efficiency and quality. We now have a solution that we can apply across the whole organization for all of our correspondence."

Phil Wiltshire
Solution architect
Unum UK



Unum has used OpenText Exstream™ across all of its business units, including Unum US and Colonial Insurance, for more than 10 years and is still committed to this powerful CCM system. Business growth brings new document production challenges, and the latest was a need to increase personalization without losing content control. Unum's answer was in the editing functionality of OpenText Exstream™ LiveEditor.

Challenge

Need for additional controls

The insurance business runs on predictable and repeatable cycles. An initial approach is made, a quotation is provided, a policy is bought and bills are sent. Any claims are dealt with along the way, and then the cycle begins again when renewal is due. It sounds simple, but each of these stages involves many crucial documents that contain complex information and can run to multiple pages.

Insurance companies must have efficient processes for generating thousands of customer communications and Unum is no exception. It's a market leading provider of income protection, critical illness cover and life insurance through the workplace and has operations on both sides of the Atlantic. It serves 20 million individuals and 175,000 businesses, including one-third of all Fortune 500 companies.

From its headquarters in Dorking and other regional offices, Unum's UK operation insures 1.4 million lives and in 2014, paid out more than £6 million a week in benefits to its customers. The company produces 100,000 documents a year, some of which can be up to 20 pages in length and can include complex information, such as tables and vital breakdowns of the product benefits. These are predominantly delivered via email.

In 2006, Unum took the decision to make the Exstream Customer Communication Management (CCM) solution its group-wide document generation program, initially purchasing the software to produce personalized contracts and booklets.

Since then, the company's use of Exstream has grown. In 2008, it included annual broker statements, integrated print-to-mail capability with Print and Distribution in 2009, extended the use to include multiple languages in 2010, added the capability to distribute documents by email in 2012, and then introduced OpenText Exstream™ Output Compare for easier document testing in 2015.

Exstream has supported Unum through many years of successful growth, but Unum UK recently found that it had yet another document generation challenge.

"The lifecycle of our documentation is predictable, but because we are the market leader, we need to commoditize," explained Graeme Short, technology capability manager with Unum UK. "We do bespoke policies and have flexibility in our proposition but when you're trying to automate documents, if you've got bespoke elements that are not necessarily reflected in your line of business systems then control is difficult.

"When people needed to change a document, we had to have manual controls in place to ensure the quality of our correspondence and that was very labor intensive."

Solution

Highly personalized

Unum UK decided to add the controlled editing functionality of Exstream LiveEditor to its Exstream implementation.

"It was a real opportunity for us to strengthen areas of weakness in terms of risk and quality and to strengthen our overall IT architecture."

Phil Wiltshire
Solution architect
Unum UK



“We did not look any further than Exstream because OpenText is our strategic partner for the whole Unum Group, so its products are what we use for various needs,” said Phil Wiltshire, solution architect with Unum UK. ***“Through ongoing use, we have become very familiar with the product and knew what offerings there were. With the support we got from the OpenText account management team, we were able to leverage the increased capabilities that have been developed over the lifetime of us using it.”***

Exstream LiveEditor ensures compliance while enabling a high degree of personalization by responding to user input and automatically populating communications with approved content. Business managers can add editing controls and rules to the interactive communication to manage end user interactions, making some areas editable, while locking others down. LiveEditor can be used for data extraction, to trigger events or to create other communications. It leverages Exstream's powerful capabilities to dynamically access corporate data and content from multiple sources, allow controlled editing and deliver communications to virtually any print or electronic channel.

In addition, Unum has further expanded its Exstream environment by adding OpenText Exstream™ Engine as a Web Service and OpenText Exstream™ High-Volume Delivery in order to reduce custom code and speed up production times.

Benefits

Production process efficiencies

Implementing controlled editing has brought a fivefold efficiency gain in document production by replacing the manual effort required to hand craft documents with automated controls. The company anticipates that further significant efficiencies and risk reduction will also be evident as its use of the new solutions matures.

Reduction of complexity in the IT environment is another plus. ***“One of the drivers for this whole change was that we embarked on a major programme of work to replace our core admin system, so we had the opportunity to re-evaluate a lot of the interfaces and the look and feel of all the correspondence,”*** said Wiltshire.

“It was a real opportunity for us to strengthen areas of weakness in terms of risk and quality and to strengthen our overall IT architecture. We had a lot of custom code around how we invoked the Exstream capability, how we managed it and how we produced the end documents.”

In addition to the controlled editing capability, Unum UK also purchased a number of additional components that have made its architecture easier to maintain, removing custom code to mitigate risk and make it more agile.

“We used to have to maintain our own custom code but this meant that the calling system would get no feedback to advise if the document was produced or not. With Exstream Engine as a Web Service (EWS), we get a technical response to tell the calling system how to proceed. EWS is a much higher performing component because it is written and optimized for Exstream. The key benefit of Exstream High-Volume Delivery is that it enables us to collate a single request.

“Often customer documentation may contain many artefacts and historically, if the system needed to create a multi-artefact email involving many PDFs, multiple Exstream requests had to be created and we then had to write code to collate the documents. This has now been replaced by a single multi-request call to EWS using Exstream High-Volume Delivery, which intelligently splits the PDFs accordingly.”

“We now have a blueprint for how other systems can leverage this capability when they need to produce documents. There’s a lot more confidence now that we have these building blocks in place.”

Phil Wiltshire
Solution architect
Unum UK





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Unum's new components have brought a culture of confidence that has enabled it to rationalize its document set and reduce the number of document templates it maintains, which will make it more efficient and agile for change. It has also been able to replace a lightweight document composition tool in its workplace system, making Exstream the company's single document composition solution.

"This whole exercise gave us the opportunity to look at all of the documents we were producing with a new set of eyes aimed at modernization and we have had some good feedback from people who say that things are clearer and the changes are welcome," said Short.

Wiltshire said, ***"We now have a blueprint for how other systems can leverage this capability when they need to produce documents rather than thinking how this system will tackle the requirement of producing documents. There's a lot more confidence now that we have these building blocks in place."***



About OpenText

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