



SUCCESS STORY FOR INSURANCE

A European Insurance Company

A European insurance company specializing in legal assistance uses Kofax Customer Communications Manager™ to fast-track the creation and distribution of correspondence with customers and partners, cutting costs, boosting efficiency and guaranteeing stellar service.

Challenge

Instead of charging clients by the hour, the European insurance company finances its legal assistance from the insurance premiums paid by its policyholders. This puts intense pressure on the company to run its business as efficiently as possible, without compromising on the high level of service delivered to customers.

The Project Manager at the company elaborates: “Clients all over Europe rely on us for insurance services and top-quality legal assistance. If a customer has an enquiry or an issue, our teams need to respond swiftly, with clear, concise information.

“For each of the insurance policies and legal cases we handle, there is a large volume of related documentation that our teams exchange with third-party agents and customers, from policy applications and endorsements to contracts and other legal correspondence. We wanted to find a more efficient way to generate these documents – not only would this save money and allow employees to work more productively, it would help the company to provide a more responsive service to both partners and clients.”

Solution

For more than a decade, the company has been using Kofax Customer Communications Manager™ to optimize the way it interacts with both customers and partners. The company first introduced the solution to improve the creation of legal correspondence, empowering legal teams to quickly and easily generate documents using a series of pre-built templates.



The European insurance company specializes in legal assistance. Its legal professionals handle more than 100,000 cases every year, ranging from personal matters, such as marital conflicts and employment dismissals, to corporate litigation.

Products in Use:

◆ Kofax Customer Communications Manager™

Focus: Customer engagement

“Kofax Customer Communications Manager helps us to engage more effectively with customers and guarantee a high standard of communication that keeps them informed and satisfied.”

Project Manager, European insurance company

The Project Manager explains: “When a lawyer wants to create a document, such as a customer letter, he or she simply has to open the appropriate template. Variable content, like a customer’s name and address, is automatically imported from the legal case file repository, and the lawyer just has to add specific case-related content manually. Our teams generate nearly one million legal documents annually with Customer Communications Manager – the solution makes it easy for them to handle this huge volume of correspondence efficiently and accurately.”

Recently, the company has extended the Kofax solution to enable customers to generate legal correspondence, such as letters regarding employment dismissal, through a self-service web portal, accessed from the company’s website. Streamlining the First Mile™ of customer engagement in this way helps the company respond more effectively to customer needs and improve their experience.

The Project Manager states: “This kind of self-service capability simplifies First Mile customer interactions, making it even easier for our customers to get the information they need, at a time and location that is most convenient for them. It is helping us to interact with customers in new ways, and build better relationships to boost their satisfaction and loyalty.”

In addition, insurance teams take advantage of Customer Communications Manager to create correspondence, and distribute it to policyholders and insurance agents via their channel of preference, by post, fax, email or online. Teams can easily include related attachments, such as policy endorsements and product flyers, with the main correspondence document, ensuring that customers and agents receive the necessary content in a single delivery.

Results

With Customer Communications Manager, the company can generate documents quickly and efficiently, with full confidence that correspondence is accurate and adheres to corporate guidelines.

The Project Manager comments: “Kofax Customer Communications Manager has had a very positive impact on the way our teams work with information. They can create correspondence much more quickly than before, with less effort, and share content with customers and partners effectively, regardless of channel. This has helped us to meet our twin aims of improving efficiency and responsiveness.

“As we work with a lot of legal documents, the content we create needs to be consistent and accurate – even the slightest mistakes can have big repercussions. The automation provided by Kofax Customer Communications Manager helps ensure that our documents are accurate, which reduces business risk and gives us great peace of mind.”

He concludes: “Customers come to us for top-quality legal assistance and service – the more our teams can do to improve the customer experience the better. By streamlining the way we create and share content, Kofax Customer Communications Manager helps us to engage more effectively with customers and guarantee a high standard of communication that keeps them informed and satisfied.”

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