



SUCCESS STORY FOR INSURANCE

Insurance Provider

This insurer has transformed correspondence management into a completely touchless and highly automated process with Kofax Customer Communications Manager™ – freeing staff to focus delivering stellar customer service and driving profitable growth.

Challenge

One of the largest insurers in its market, this company continues to grow at a ferocious pace. However, expansion was putting a strain on the insurance provider’s paper-based customer communications processes.

The company’s Head of IT explained, “Business has grown by 10 percent in the last year alone – and we’re not about to rest on our laurels. Our goal is to keep expanding our product portfolio and customer base at a similar annual rate until 2020, significantly increasing our market share. However, this level of growth also brings challenges. In particular, we found that sending important documents out to customers was far too labor-intensive and took far too long.”

In the past, the insurer would prepare all customer communications, such as policy cancellation letters, manually – a tedious and time-consuming process. In the motor insurance department, for instance, administrative staff had to gather customer data from several back-office systems and then edit a standard Word template to fit the requirements.

“We send out more than 2,000 motor insurance policy cancellation letters a month,” said the Head of IT. “Because the existing process required so much manual work, it took 50 minutes to prepare just one document. Our motor insurance business grew by 20 percent last year, and we were definitely feeling the strain of such slow processes, particularly during busy periods.

“In our market, motorists have the right to cancel their vehicle insurance every year, so we always experience a sudden spike in both cancellations and new policies being taken out during November and December. Due to strong growth, this rush was



This insurance provider offers a wide range of life, accident, building and contents, and motor insurance products and services.

Products in Use:

- ◆ Kofax Customer Communications Manager™

Focus:

- ◆ Customer Communications

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Head of IT, Insurance provider

becoming harder and harder to deal with. We often had to hire temporary staff and ask employees to work overtime just to keep up with customer communications. Something had to give."

To absorb the impact of business growth without affecting customer services, the insurance provider wanted to increase the efficiency of customer communications administration.

Solution

Keen to digitize and automate its manual customer communications processes, the insurer decided to implement Kofax Customer Communications Manager™.

The insurer created over 80 standardized letter templates in the Kofax solution. Next, the insurer integrated Kofax Customer Communications Manager with its core back-office systems to automate letter population.

The Head of IT explained, "Using the insurance policy number, the Kofax solution gathers data from all the relevant sources and automatically formats the information into the template. Staff can then choose to send the completed document out to customers via email, mail or fax. It's as simple as that! Users no longer have to spend time manually gathering data and filling out templates.

"What's more, staff no longer have to print a paper version of the document, put it in an envelope and mail it, as we work with a postal company who manages all of this for us. It's a completely touchless process, which has dramatically improved the efficiency of customer communications."

Results

With Kofax Customer Communications Manager, the insurance provider has transformed customer communications processes, giving business a real boost.

"We're delighted with how easy to use and flexible Kofax Customer Communications Manager is," remarked the Head of IT. "Users simply select the right template and the system automatically does the rest. By releasing staff from laborious manual data gathering and entry processes, the Kofax solution has made their life much easier and freed up a significant amount of time that can now be spent on more value-added tasks, such as handling customer issues."

The efficiency gains have enabled the insurer to seamlessly absorb growing business volumes while keeping costs and staff levels steady.

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Head of IT, Insurance provider

The Head of IT noted, "We no longer have to take on temporary staff or increase overtime to cope with the sharp increase in motor insurance policy cancellations and new applications during our busiest period at the end of the year. Since introducing Kofax Customer Communications Manager, motor insurance policy volumes have grown nearly 20 percent and we have been able to absorb the increase while keeping staff levels completely flat. As an added bonus, digitizing the entire customer communications process has dramatically reduced paper costs."

Today, the insurance provider can deliver customer communications more efficiently than ever before, boosting customer satisfaction.

"We have won a prestigious national award recognizing customer service excellence for the last two years in a row. We couldn't have achieved this without Kofax Customer Communications Manager," the Head of IT concluded. "The Kofax solution enables us to deliver impeccable customer communications very efficiently, which form the foundation for our customer support and claims handling services."

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