



#### Industry

Insurance

#### Customer

Shenandoah Life

#### Business Challenges

- To improve customer service
- To reduce the time required to process policy applications
- To eliminate cumbersome paper-based processes

#### Business Solution

##### Livelink for ERM

- Images are archived, indexed and managed in a centralized repository throughout the document business lifecycle
- Authorized personnel have direct access to all enterprise content directly from their desktop
- Customer service representatives have immediate access to case files, and are better equipped to resolve inquiries on the first call and provide enhanced customer care
- Workflow technology enables process visibility

## Shenandoah Life — Improving business process visibility

*Open Text™ workflow technology enables Shenandoah Life to easily automate and streamline document-driven business processes. Virtually 100 percent of new individual policy applications—over 41,000 annually—are imaged and processed using the Open Text technology. The solution has provided increased process visibility and enabled managers to better meet service level metrics, easily correct inefficiencies, redistribute workloads, and minimize training costs.*

### Organization

Shenandoah Life is a financially strong, growing regional mutual insurance company known for superior performance in its chosen markets. Based in Roanoke, Virginia, the organization has over 1 billion dollars in assets. The mission of Shenandoah Life is to provide financial security and a sense of well-being for its policyholders, which the company achieves through its continuous provision of superior customer service.

### Situation

In 1999, as the number of new and improved life insurance applications was flooding the market, Shenandoah Life decided to align technology with corporate strategy to manage growth and turn customer service into a competitive advantage. In order to accomplish this without a large increase in staff, the organization needed to reduce the time required to process policy applications. This was no easy task given the complex and largely paper-based nature of the involved processes: paper documents were being received and processed in several departments within the company. Routing documents across the various contact points for document handling was time consuming and created inefficiencies resulting from employees searching for misplaced documents.

### Solution

From a pool of thirty vendors, Shenandoah Life chose Open Text's Livelink® for Enterprise Report Management (ERM) solution, together with imaging and workflow modules.

Shenandoah Life chose Open Text technology to transform paper documents into digital assets that could be managed using a central repository. The company selected the business process workflow module for its ability to automate and streamline the distribution of electronically captured documents to appropriate individuals throughout the organization for processing. Lastly, Shenandoah Life chose Open Text for its open and flexible architecture that would enable customization possibilities including the integration of data and core applications with the solution's workflow module.

Shenandoah Life first implemented the Open Text document imaging and workflow technology in October of 2000 as part of a pilot project aimed at the company's existing final expense individual life insurance product.

*"The competitive advantages Open Text software provides are tangible and straightforward: information is current and available, and that empowers our employees to be more satisfied, productive, and focused on their core responsibilities."*

**Gene Berry, CIO, Shenandoah Life**

The Open Text imaging module, Livelink for Production Imaging, electronically captures each new final expense policy application upon receipt. The solution then archives, indexes, and manages the images in a centralized repository throughout the document business lifecycle. Authorized personnel are able to retrieve all enterprise content—IBM iSeries 400 reports, letters, faxes, and MS Office™ files—directly from their desktop. Customer service representatives, who once waited between twenty-four and forty-eight hours to retrieve documents on Microfiche, now have immediate access to case files, and are better equipped to resolve inquiries on the first call and provide enhanced customer care.

Once captured electronically, Open Text's integrated workflow module automatically routes documents to appropriate individuals for handling. Shenandoah's IS department was able to easily customize the workflow to generate letters, automatically populate data fields within the letter with information retrieved from core back-office systems, and then capture the letter in the document repository.

**Benefits**

According to Shenandoah Life President, Bob Clark, the positive results of the pilot project were clearly indicated, "Within three months of implementing the Open Text imaging and workflow technology, our application turnaround time decreased by over fifty percent in the automated areas!"

The success of the pilot project prompted other department managers to request the CIO Gene Berry's IS team to extend the Open Text technology to their areas. Berry's team formed workflow action committees to work with the business units to develop solutions for document driven-business processes.

Currently, virtually 100 percent of new individual policy applications—over 41,000 annually—are imaged and processed using the Open Text workflow technology. The transaction process has become transparent, enabling managers to better meet service level metrics, easily correct inefficiencies, redistribute workloads, minimize training costs, and improve employee morale.

The next stage of the project will be to leverage Open Text technology to Web-enable the document repository in order to enable remote agents to become more involved in tracking the progress of documents as they are processed.

Berry asserts, "The competitive advantages Open Text software provides are tangible and straightforward: information is current and available, and that empowers our employees to be more satisfied, productive, and focused on their core responsibilities."

"The bottom line," Berry concludes, "is that Shenandoah Life can facilitate rapid growth and improve service without incurring a proportional increase in employee costs."

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