opentext™

SUCCESS STORY

Bankers Insurance

Industry
• Insurance

Solution
• OpenText™ Fax2Mail™

Results

Eliminated telecom charges, software fees and maintenance with a **100% cloud-based solution**

Greater reliability, availability and security
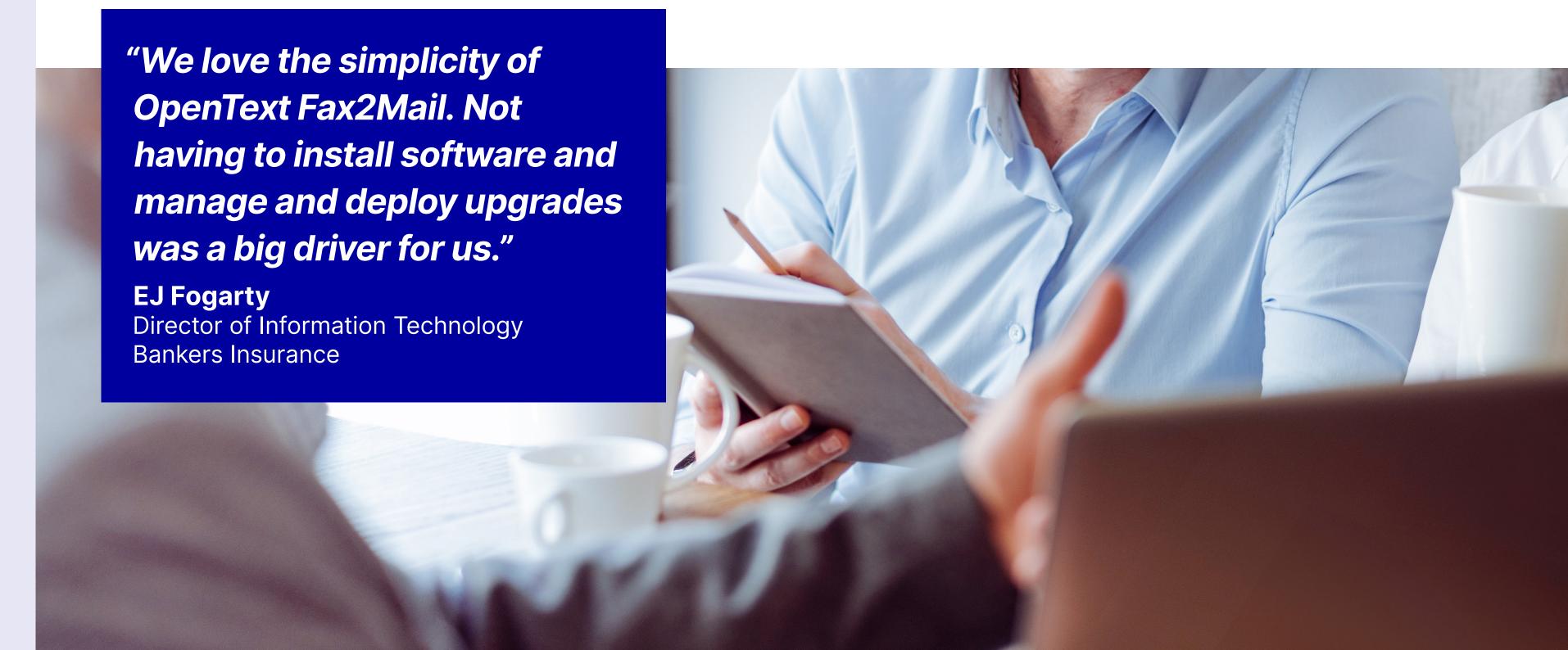
Improved productivity with reduced cycle times

Industry-standard encryption and data security

BANKERS INSURANCE LLC
Insuring today to ensure tomorrow.

Insurance agency reduces costs and improves productivity with Cloud Messaging from OpenText

Bankers Insurance uses OpenText Fax2Mail for cloud-based fax services

"We love the simplicity of OpenText Fax2Mail. Not having to install software and manage and deploy upgrades was a big driver for us."

EJ Fogarty
Director of Information Technology
Bankers Insurance

Bankers Insurance was formed in 1999 by a consortium of community banks throughout Virginia. Bankers Insurance now operates in 18 communities throughout Virginia and North Carolina, offering commercial, personal and employee benefits insurance. With more than 200 insurance professionals, Bankers Insurance is currently the 5th largest insurance agency based in Virginia and the 93rd largest insurance agency in the United States.

At Bankers Insurance, the client comes first. Even in today's challenging economic times, the company strives to deliver comprehensive and competitively priced insurance products through financially strong insurance companies. Over the years, Bankers Insurance acquired multiple independent insurance agencies. Integrating acquired companies can be challenging from both an operational and a client perspective. Bankers Insurance, however, is committed to maintaining the dedicated service level of a small agency, backed by large agency resources. As the director of information technology (IT) at Bankers Insurance, EJ Fogarty has spent many years supporting that commitment to client service through operational and strategic IT initiatives, such as the recent move to OpenText™ Fax2Mail™.

Challenge

In 2013, Bankers Insurance switched to a new agency management system to handle its operations. But the fax offering through this new line-of-business system was limited. The previous application had a fax server that the company used primarily for outbound faxing. Since faxing continues to be an important part of operations at Bankers Insurance, Fogarty saw an opportunity to ease the IT burden, improve employee efficiencies and reduce costs by moving to an email-based faxing solution.

Cloud-based fax messaging—secure, reliable and easy to use

Bankers Insurance had several requirements for a new fax solution, beginning with the cloud. Fogarty saw a cloud-based solution as a way to address several major concerns, one of which was disaster recovery. *"The existing solution wasn't very recoverable because it was a physical line going to a physical server,"* he explained.

By taking the fax service to the cloud and avoiding the installation and maintenance of software, Bankers Insurance could also free up valuable IT time and money. Moreover, Fogarty hoped to solve a problem that arose when the company switched the main line-of-business application. Bankers Insurance was using a cloud-based customer self-service portal for insurance certificates.

"The existing solution was expensive. We had to pay for the physical fax lines, as well as maintenance for the server equipment. We also wanted our new fax solution to be able to function with our customer portal solution," explained Fogarty.

Security was also at the top of the list of requirements. *"If we were going to use email to fax, we needed the necessary encryption. We needed to know that whatever we were faxing was protected just like a normal fax would be, when it comes to any HIPAA [Health Insurance Portability and Accountability Act] or BII [Business Identifiable Information] guidelines,"* added Fogarty.

Not to be overlooked were other key solution requirements such as management and usability. From an IT perspective, Fogarty wanted a product that would allow them to have central administration of users and, from a user perspective, the solution needed to help improve staff productivity.

"Getting the right kind of security documentation from vendors was difficult, but OpenText was able to provide us with the necessary kind of support on encryption and data center security."

EJ Fogarty
Director of Information Technology
Bankers Insurance

Solution

Fogarty described the process of finding a solution to meet their requirements: *"We went out and searched and it was a difficult process for us to find the right vendor. We went through a lot of vendors."* Bankers Insurance ultimately chose the OpenText Cloud desktop fax service, OpenText Fax2Mail. Fax2Mail is a cloud email-based faxing service that allows companies to receive and send faxes as electronic messages directly from their email accounts.

Greater security, reliability and availability via cloud computing

Fogarty checked off the reasons for choosing OpenText: secure, cloud-based, disaster recovery. *"Getting the right kind of security documentation from vendors was difficult, but OpenText was able to provide us with the necessary kind of support on encryption and data center security."* Fax2Mail uses industry-standard encryption, redundant systems and components that are in place for security and backup service. The solution is supported by a network of multiple geographically diverse data centers that provide service availability 365 days a year. The cloud-based solution will safeguard the company's fax services in the event of a disaster, ensuring uninterrupted service anywhere at any time.

Since the product is email-based, the company did not need to install software on the user machines. *"We love the simplicity of Fax2Mail. Not having to install software and manage and deploy upgrades was a big driver for us,"* noted Fogarty.

Also important was that Fax2Mail could work with their insurance certificate portal application. *"That was another big sell for us,"* said Fogarty. *"It makes that process a lot cheaper because we have*

staff that will still utilize that cloud-based application to send certificates to clients. They log on to that portal when a client needs a certificate of insurance and they can use the Fax2Mail solution."

Easy to use for staff and administrators

Fax2Mail management and usability also stood out over the other products that Bankers Insurance looked at—centralized administration, reporting, user management, cover sheet management, billing attributes as well as delivery report options. Fogarty wanted a solution that was quick and easy for users. *"We wanted to simplify as much as possible. Need to send a fax? Just put the fax number in at Fax2Mail and off you go,"* he explained.

A product feature that was particularly popular was the way Fax2Mail processed fax confirmations, by confirming message details and providing a thumbnail of the cover page in the confirmation. *"Users really liked that because that way the people who send faxes back can attach that confirmation back into the client record. Some of the other solutions did not offer that level of detail in the fax confirmations. That was another nice feature that Fax2Mail had,"* said Fogarty.

Implementation

With a cloud and email-based faxing solution like Fax2Mail, deployment was simple and users were quickly able to receive and send faxes directly within their email accounts. Most outbound and inbound faxing at Bankers Insurance now uses Fax2Mail. For example, inbound faxes now come in through a main fax number and are consolidated into one mailbox, where they are then routed to the appropriate staff. Fogarty explained: *"They process the faxes that come in from the inbound side in email. They*

"Initially, we hoped just to break even on cost or at least not increase cost that much. But we've ended up drastically reducing our costs with Fax2Mail."

EJ Fogarty
Director of Information Technology
Bankers Insurance

process it right in our system—they take that email and put it in our system as an open activity." With Fax2Mail, the electronic messages can also be securely archived and are available for audit.

Benefits

Eliminating fax infrastructure costs and complexity

While cost reduction was not the primary driver for Bankers Insurance, Fogarty is pleased that the Fax2Mail solution has saved the company money. *"Initially, we hoped just to break even on cost or at least not increase cost that much. But we've ended up drastically reducing our costs with Fax2Mail,"* he explained.

Bankers Insurance no longer incurs the ongoing cost of maintaining physical fax lines, long-distance charges and supporting the server and software. *"Looking at our old telephone bills, we averaged around $450/month in phone line costs alone. Software maintenance on the fax server was approximately $1500/year. All said, it was roughly $6900/year plus IT support time, which was much more than it is now,"* estimated Fogarty.

Reliable cloud messaging network

Fogarty sees major benefits in the cloud-based fax solution. *"In terms of disaster recovery, the recoverability is great, as is the fact that it frees up our IT folks because they're not supporting the back end for the solution. It's just way easier with this solution than it was before and the reliability is great. We have found that OpenText Fax2Mail works very well in the cloud and we're very comfortable using it."*

Improved productivity and efficiencies

In addition to cost savings, Bankers Insurance also experiences IT time-savings with Fax2Mail—administrators can quickly provide fax numbers directly to users. *"I love that I can set up fax numbers easily,"* said Fogarty. *"For example, if HR needs a private fax number for inbound or they have a new hire who needs their own fax number, I can set that up and assign a fax number to them very quickly. It's so efficient—you can't even compare it to the old way of calling a phone provider to get a new phone line or new phone number."*

Beyond the IT benefits of the solution, end users have also embraced Fax2Mail. *"I love OpenText Fax2Mail, it's very easy to use and makes sending faxes a much simpler process,"* said Desiree Adams, Group benefits account manager at Bankers Insurance. Anais McCrickard, personal insurance account manager, echoed that statement: *"OpenText Fax2Mail helps with my workflows that involve faxing. It's very quick and easy to use."*

Future

With the success of solutions like OpenText Fax2Mail in the OpenText Cloud, Fogarty knows that he is on the right track when it comes to technology initiatives that can help Bankers Insurance meet its commitments. Looking to the future, he is considering further cloud-based activities, which, like Fax2Mail, can reduce the IT footprint, decrease costs and ultimately serve clients more efficiently.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

Customer stories ⬈

opentext.com/contact

Twitter | LinkedIn