opentext™

SUCCESS STORY

Pacific Life

Industry
- Financial services

Solutions
- OpenText™ Content Suite
- OpenText™ Core Share

Services
- OpenText™ Cloud Managed Services
- OpenText™ Professional Services

Results

☑ **Gained secure hub** for critical data

🔒 **Reduced risk**

⤴ **Redeployed IT resources**

👥 **Increased agility** in delivering business solutions

PACIFIC LIFE

Pacific Life establishes a coordinated approach focusing on agility, business objectives and a cloud-first model

Financial enterprise aligns information governance and technology with content strategy built on OpenText to mitigate risk

"We see OpenText Content Suite as the hub for storing and managing our 'crown jewels' for the organization."

Riley McIntosh
Manager for Enterprise Content Management
Pacific Life

For Pacific Life, a California-based financial services enterprise founded in 1868, aligning information governance with integrated content technology is the recipe for effective content management in the 21st century.

Best known for insurance, Pacific Life also offers investments, annuities, real estate and even aircraft leasing. Not surprisingly, risk management across such a diverse company poses difficulties.

"We operate in a decentralized model, which makes doing anything enterprise-wide challenging," explained Riley McIntosh, manager for Enterprise Content Management at Pacific Life. *"But, we have risk to mitigate, so that has to be central to everything we do."*

Like other financial services companies, Pacific Life is subject to strict data and cybersecurity regulations. Departments across the enterprise had deployed their own solutions, however, managers quickly found themselves wrangling multiple content management platforms.

Pacific Life reevaluated and established a coordinated approach focused on agility, business objectives and a cloud-first model, with OpenText™ Content Suite at its center. Content Suite maximizes the value of content and enables an organization to share, collaborate, analyze and make decisions with content, while mitigating risk through governance, compliance and security.

McIntosh, who previously managed information risk governance from the business side, took on responsibility for technology governance as well. *"It was pivotal for the organization to bring the two together, really aligning governance and technology,"* McIntosh said. She noted that proven integration established OpenText products and services as the foundation of the disciplined approach.

Pacific Life discontinued an ECM platform that had been in use at the enterprise for more than 20 years. *"When we looked at the platform, the user experience was not great. We hadn't kept up with upgrades,"* McIntosh explained. *"It was a prime candidate to decommission and migrate all that content into OpenText Content Suite in the OpenText Cloud."*

The company used OpenText™ Cloud Managed Services to consolidate ECM with a focus on integration, security and risk management. *"Part of our program is getting rid of duplicative technologies and getting really good at those that we have a roadmap built for. OpenText is at the heart of that,"* McIntosh said.

Now thousands of Pacific Life employees use Content Suite to share unstructured data securely throughout its lifecycle. *"We see Content Suite as the hub for storing and managing our 'crown jewels' for the organization,"* McIntosh said. She noted that consolidating platforms encourages end users to see value in a go-to place for critical information. *"We find that the business areas also inherently see the value of OpenText and its capabilities for workflow and automation, so our menu of services is growing."*

Attention is directed at departments staffed by heavy creators and custodians of records subject to laws and regulations. *"We do risk assessments, so we're tackling the data that poses the most risk to the company first,"* McIntosh said.

Pacific Life now relies on deep expertise from Cloud Managed Services to maintain its foundational system. *"We're much more agile in delivering our solutions now that we're leveraging OpenText Cloud Managed Services,"* McIntosh said. *"We're not dealing with the red tape internally to get servers spun up or deal with networking or storage. That's all managed by OpenText… it's much more efficient."*

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> **Riley McIntosh**
> Manager for Enterprise Content Management
> Pacific Life

Before selecting Cloud Managed Services, Pacific Life completed cost comparisons for hosting, but the partnership with OpenText proved the deciding factor. *"It truly was a partnership… we've really been thrilled with the performance."* In fact, the company redeployed IT resources to provide business value through new solutions rather than handling operations, such as patching, upgrading and day-to-day functionality.

The team also installed OpenText™ Core Share to share and sync information via the cloud, which runs on a Software as a Service (SaaS) model. Core Share integrates with Content Suite to ensure security and control for a holistic information management strategy.

Aligning efforts and building upon the adaptable OpenText platform enables Pacific Life to optimize business performance for changing governance requirements and technology. *"Our vision is to deliver and support effective and efficient content management across the enterprise, while allowing for business unit flexibility,"* McIntosh said. *"With OpenText, our team works much more effectively because we have the program, services and strategy along with the technology."*

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.

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