**opentext**™

## Success story

**The Word & Brown Companies**

**Industry**
• Insurance

**Solutions**
• OpenText Exstream™
• OpenText™ LiquidOffice™
• OpenText™ TeleForm™

**Partner Support**
• iManage Work®

**Results**

⚙ **Automated manual processes** and streamlined search capabilities to save time and money

⏱ **Reduced production time of monthly renewal documents** from 30 minutes to 30 seconds

🧩 **Provided a single, integrated platform** that can be used across the board by all five companies

👥 **Decreased costs through increased productivity** and reduced overtime on financial document production

# The Word & Brown Companies introduces an amazing tool

## OpenText provides an across-the-board solution

*"OpenText Exstream is so fast we don't have a printer in-house that's fast enough to keep up with it. What the product can do is amazing. The speed is phenomenal and that's where we are going to see the biggest value."*

**Aaron Watts**
Document Technology Team Lead
The Word & Brown Companies

**Forms and information gathering are the lifeblood of America's leading provider of insurance services, The Word & Brown Companies. It needed one enterprise-level document management system that could be used across its five companies and the answer was to implement the OpenText market-leading content management and customer experience software and solutions.**

## Challenge

### Diverse processes

Headquartered in Orange, California, The Word & Brown Companies works with more than 50,000 brokers to provide insurance services to hundreds of thousands of individuals and to almost 60,000 employers with nearly 6.5 million employees. The organization's product portfolio includes individual, family and Medicare plans, accident, dental, vision and life insurance coverage. During its near-30-year lifespan, The Word & Brown Companies has become the nation's leader in these markets.

The Word & Brown Companies is made up of five distinct companies that focus on different segments of the insurance marketplace. The Companies' business revolves around forms and information gathering, but each of the five processes these in different ways.

*"We receive information in every way you can think of, from fax and snail mail to electronic submissions, PDFs and emails. Some information even comes in verbally,"* says Aaron Watts, document technology team lead at The Word & Brown Companies. *"The quantities are also huge. For example, the Member Processing Center for our CHOICE Administrators company deals with thousands of documents a month. We have to somehow collate, identify, store and retrieve all this information and a lot of that has to be done within legal guidelines to protect privacy."*

Each company had its own method of tracking. Some were using software and some were still using paper files. The lack of automation was expensive, time-consuming and created challenges for scaling the business. CHOICE Administrators receives most of its incoming documents by fax and these had to be manually entered into back-end systems. If this delayed a customer application, The Word & Brown Companies could be liable to pay the outstanding premiums. It needed a better system for tracking, routing and retrieving paper documents. *"We were looking for an enterprise grade document management system, so everyone would be using the same solution rather than multiple home grown or off-the-shelf silos. We wanted one platform that the entire family of companies could use simultaneously,"* said Watts.
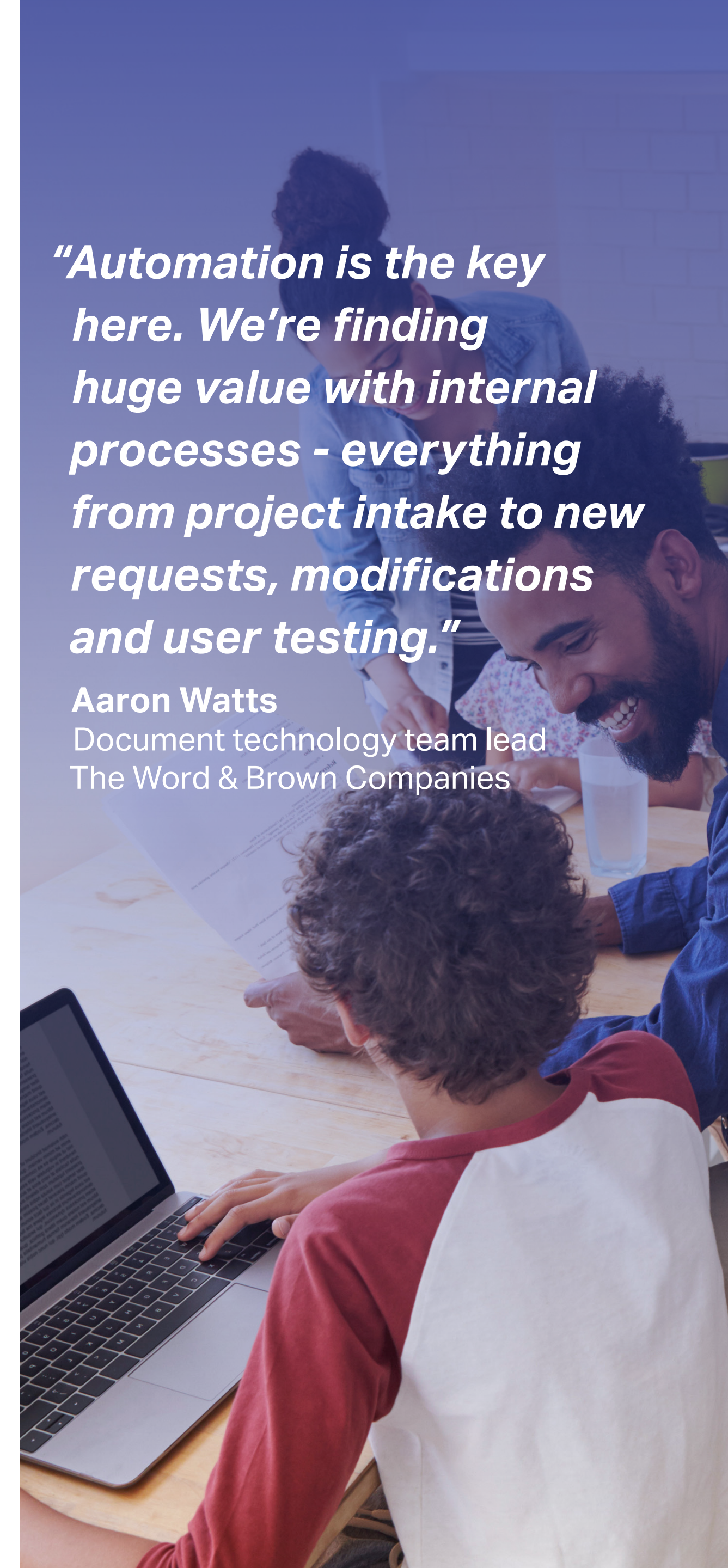
## Solution

### Powerful combination

The Word & Brown Companies considered a number of vendors and then asked a shortlist of three companies to demonstrate their products. The favored vendor platform included OpenText Exstream™ and powerful content management solutions: OpenText™ LiquidOffice™, OpenText™ TeleForm™ and OpenText partner, iManage Work® (formerly known as Worksite). Combining these tools creates an across-the-board solution that can capture information, extract data, provide ongoing document management, automate workflow and processes and also generate documents.

Exstream customer communications management software automates business processes and helps users design and deliver customized, multi-channel communications to improve the customer experience. LiquidOffice captures and understands information making business processes consistent and auditable. TeleForm, which The Word & Brown Companies had already used for a number of years, streamlines

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document driven business processes by using powerful recognition technologies to automatically capture, classify and extract information from paper and electronic documents. iManage Work manages business documents, making them easier to find, share and re-use. The Word & Brown Companies also bought the iManage Records Manager module for archiving.

*"The fact that we could source all these solutions from one vendor was hugely important,"* said Watts. *"To test Exstream, we used our 75-page Enrollment Quote for CaliforniaChoice, our small group private health exchange. We generated a PDF file then used Exstream to generate 10,000 quotes on a laptop in just seven minutes and 31 seconds. The speed blew us away."*

The Word & Brown Companies also signed up for Exstream training and certification courses.

The Enterprise Content Management (ECM) solutions tap into many of The Word & Brown Companies sources enabling the organization to access and understand virtually any data type or system, as well as control, leverage and take action on this information. As a result, it can gain a full understanding of information across data silos, enable more productive collaboration, increase preparedness for legal and regulatory inquiries, protect and secure information and ensure data retention and disposition.

## Benefits

### Saving time and money

All of The Word & Brown Companies plan to migrate to OpenText solutions. CHOICE Administrators is among the first, and is already seeing the benefits of Exstream for generating renewal and new business quote documents. It produces 300 of these 75-page documents a month and what used to take 30 minutes now takes 30 seconds per document.

Another use-case is the 800-plus broker commission statements generated each month for Choice Builder. Because it required a lot of manual formatting, the previous process took four people four days a month. By using Exstream and LiquidOffice workflows, the automated process now takes one person just 45 seconds.

Exstream and LiquidOffice have also successfully integrated The Word & Brown Companies finance department. The technical team created a workflow with an eForm that Exstream utilizes to generate documents for the department. This process alone saves the company USD $30,000 a year from increased productivity and reduced overtime.
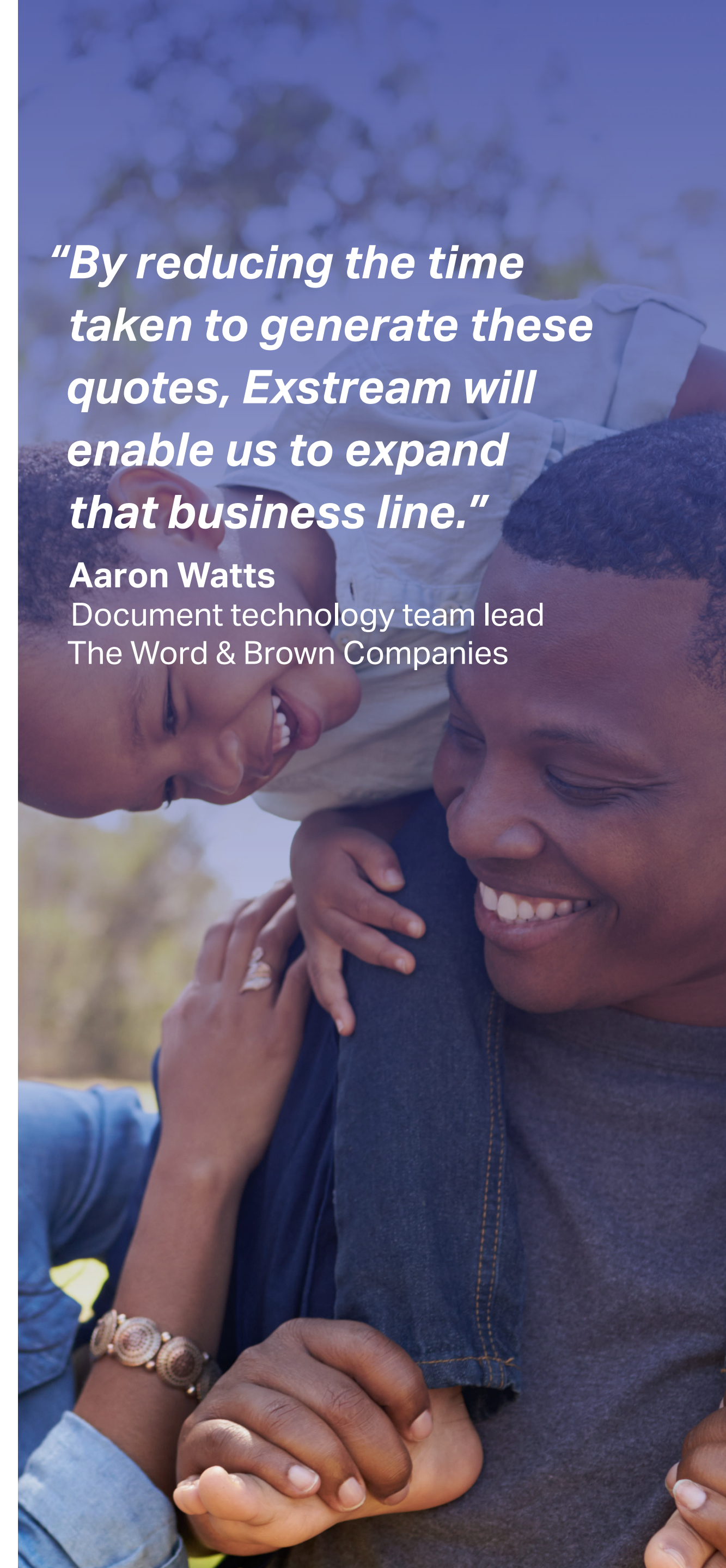
Another planned project is to see the integration of Exstream and LiquidOffice into the General Agency's huge Health Plan Reference Guide, which is the size of a telephone directory. For 17 years, collating the information has been a manual process, the DocTech team has now created a LiquidOffice workflow that will automate the process and enable the whole guide to be produced in Exstream. The workflow will make updates easy. The database will be updated and export an XML file to Exstream, which then generates the book on user request.

*"Exstream is so fast we don't have a printer in-house that's fast enough to keep up with it. What the product can do is amazing. The speed is phenomenal and that's where we are going to see the biggest value."* said Watts. *"I also love how easy it is to map XML and the variables. Eventually, we will give the business users more control over making edits rather than having to come to IT every time. We can use LiquidOffice to give them an application that updates database variables; they can change their own output on the fly without having to incur development costs. That is also going to be a huge saving.*

*"By reducing the time taken to generate these quotes, Exstream will enable us to expand that business line."*

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Document technology team lead
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*"My team has a project intake process that is done via LiquidOffice workflow. Users go to our Microsoft® SharePoint® site and click 'request project.' We have a complex workflow that goes back and forth between approval processes, full project review, board sign-offs and at the end, exports everything and dynamically generates an iManage Work workspace for said project.*

*"It's the slickest process in the entire company. Automation is the key here. We're finding huge value with internal processes—everything from project intake to new requests, modifications and user testing. It's all workflow and it's all done in LiquidOffice."*

A major iManage Work benefit to The Word & Brown Companies is the fact that it has a single check-box for data that is Health Insurance Portability and Accountability Act (HIPAA) compliant.

*"With a single click, a company can be HIPAA compliant and that's huge. That click says that anything that has to be HIPAA compliant, must be encrypted both at rest and in transit and that is massive,"* said Watts. *"Also, with iManage Work, you can store any kind of file* you want, search for it, find it and retrieve it. The full text search capabilities of the IDOL (Intelligent Data Operating Layer) engine are astronomical and the fact that it will open up an audio file and look for the word you typed in the search is truly space-age.*

*"The idea that search values are based around the folder you are storing the item in as opposed to the item itself makes a lot of sense. It makes more than 90 percent of our manual indexing disappear. If I can simply drag a document into a folder and it inherits all the properties of the folder, there is really no need for manual indexing. So once we roll that out to CHOICE Administrators, it's going to be a massive time saver."*

These tools are also enabling Word & Brown Companies to win new business. One business line quoting up to 50 insured lives needed to expand to 199 lives, but that could take up to 12 hours per quote with the old back-end systems. *"By reducing the time taken to generate these quotes, Exstream will enable us to expand that business line,"* said Watts. *"It will help our company grow and it will grow with us."*

## 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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