

HP customer case study: Gore Mutual uses HP Exstream interactive document applications to streamline customer correspondence processes and significantly improve agent productivity

Industry: Insurance

Gore Mutual deploys HP Exstream interactive document applications and gets extreme results



“Using HP Exstream saves a huge amount of document generation time which means our trained staff can focus on key customer-facing needs including enhanced service delivery.” Lisa Whaley-Chase, Project Manager, Gore Mutual

Objective:

Gore Mutual Insurance Company needed to replace its legacy document generation system with a flexible solution that included the ability to integrate back end document processing with front office letter generation while improving consistency, efficiency and accuracy with automated processes.

Approach:

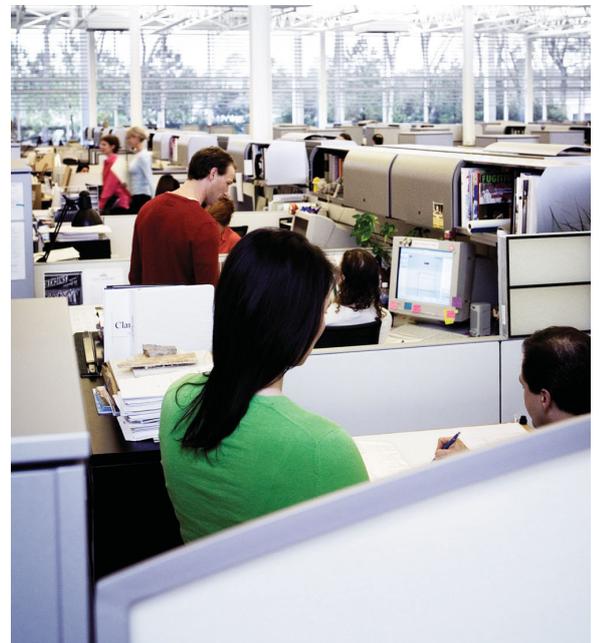
- Gore Mutual searched for a single enterprise document automation platform with robust functionality and flexibility for design through delivery of high-volume, on-demand, and interactive document applications across the enterprise.
- Gore Mutual implemented the HP Exstream document automation software.

IT improvements:

- Web-based document creation enables Gore Mutual employees across all locations.
- Number of letter templates reduced by 56 per cent in some departments.
- Increased control resulting in fewer errors and better compliance.
- Time spent generating letters reduced from more than 15 minutes to approximately two, or about 85%.

Business benefits:

- Reduced postage, paper and assembly costs, and lowered document development and processing costs.
- Trained employees save up to six man hours a day.
- Decrease in manual processes allows employees more time to focus on clients.



Established in 1839, Gore Mutual is one of Canada's oldest federally-licensed property and casualty insurers and was named the #1 insurance company in Ontario in 2006 and 2008. Like most insurance companies, the Ontario-based insurer generates large quantities of customer documentation such as policy declarations, billing notices and claims correspondence. Operating in a competitive marketplace, its customers demand faster service while the need for maintaining compliance remains critical.

Gore Mutual exceeded the capabilities of its legacy document generation system so that significant programming changes were necessary to make even simple changes – and the realisation that many of Gore Mutual's processes were inefficient prompted a search for a more robust solution.

For example, claims adjusters were spending approximately 2.5 hours per day creating letters in Microsoft Word, printing them on desktop printers, scanning them into the document management system, affixing postage and mailing them through Canada Post.

Customer solution at a glance

Primary software

- HP Exstream

In addition, Gore Mutual's document services team regularly received stacks of letters to be manually scanned and assembled with other documentation and attachments.

As a result, Gore Mutual launched a Document Generation Project to find the right solution to replace its legacy system and the manual letter generation process. The number one criteria was for a single, intelligent infrastructure for document generation and distribution that would allow business units to control content while providing consistency, efficiency, compliance support and accuracy with automated processes and real-time document generation.

Intelligent, live document applications

"The HP Exstream solution proved that it would meet our requirements and was considered the more mature product following a proof of concept demonstration. To assist us with our final decision we obtained positive references from other companies using the product and conducted an onsite visit with a large financial organisation," says Sean Christie, VP Strategic Projects, Gore Mutual.

HP Exstream software provides fully integrated capabilities for end-to-end document processing, including variable design and controlled interactive document editing, testing, real-time composition, advanced data and content integration with output to more than 20 print and electronic formats from a single design, and assured document delivery. It meets the most sophisticated document generation requirements – from developing and streamlining high-volume bills and statements, to personalising and automating fulfillment of on-demand policies, claims correspondence, quotes and proposals.

Reduced complexity

With initial help from HP Exstream specialists and using HP OnDemand deployment software, Gore Mutual started by converting the design and output of its billing documents then progressed to personal lines, commercial lines and auto policy declarations. This was accomplished in just ten months. In parallel Gore Mutual also engaged a third party to develop a Web application that integrates with the HP

Exstream interactive capability. Reducing paper-based processes in favour of electronic workflows, HP Exstream interactive document applications allow users in any Gore Mutual location to create letters, select the recipients, add cc documents, dictate the form of delivery and attach documents from the document management archive. To create their letters, users select a pre-formatted letter template, make their edits in designated areas and then submit for processing following business workflows. The document and accompanying instructions go to the print stream and a copy in PDF format is automatically sent to the document management system.

Most business units experienced a streamlining of documents. In one department the letter templates were reduced by about 50%, significantly reducing complexity. Gore Mutual now has about 200 HP Exstream users using its DocPro application daily.

Business benefits

"Prior to using HP Exstream interactive documents, anyone could create and mail a letter but now we have much better control. There is user authentication based on individual roles in the organisation as well as approval workflows where needed," states Whaley-Chase.

"The key business benefit of using HP Exstream is the amount of time saved," says Heidi Sevcik, Vice-President Claims, Gore Mutual. "This gives our trained claims adjusters more time to focus on claims adjudication and on clients."

About Gore Mutual

Established in 1839, Gore Mutual Insurance Company is one of Canada's oldest federally licensed property and casualty insurers. Gore Mutual has been named the #1 insurance company in Ontario by the Insurance Brokers Association of Ontario (IBAO).

The company provides both personal and commercial insurance through their offices in Cambridge, Ontario and Vancouver, British Columbia. For more information, visit www.goremutual.ca

To learn more, visit www.hpexstream.co.uk

