

Enhancing customer communications. Guardian enables their sales force with a more relevant and effective marketing tool.



Guardian Life wanted to provide the group insurance sales force with a tool that would allow sales representatives to create fully-customized broker marketing guides, while accelerating time to market, eliminating traditional inventory and obsolescence issues, and reducing costs.

Background

The Guardian Life Insurance Company of America is one of the top mutual life insurance companies in the United States. The company wanted to improve the way group sales collateral are printed, stored and distributed. Specifically, its group insurance department sought a more effective process so group sales representatives could deliver customized sales guides to their prospective clients.

The Challenge

Guardian's traditional approach involved printing and warehousing an extensive collection of marketing collateral. But printing, storage and shipping costs were high and avoiding excessive inventory was difficult. Information obsolescence was also a challenge due to ever-changing industry regulations.

In addition, since the product portfolio varied almost on a state-by-state basis, it was virtually impossible to provide the sales force with the exact product or plan descriptions specific to their interest.

To solve these problems, Guardian decided to switch from a traditional "print and inventory" sales collateral system to a fast, efficient and highly flexible Web-based solution engineered by Xerox.

The top-priority goals were to:

- Give sales professionals the ability to create customized and highly targeted sales guides with only those products and services relevant to their potential client
- Provide an easy, cost effective way to keep collaterals up to date
- Reduce printing, shipping and storage costs

Enabling relevant customer communications. Selling more effectively.

The Solution

We worked closely with Guardian to design, engineer and host a complete turnkey solution that would give the group sales force access to a comprehensive portfolio of customizable sales collateral through an easy-to-use Web portal.

By logging on to the portal, group sales representatives could:

- Quickly create personalized sales guides for each of their customers by selecting only those products and services that were relevant to them and adding localized contact information
- Print the sales guides in their office on Xerox® multifunction devices if they needed to provide to a client quickly
- Request larger volume orders, which are automatically routed to Guardian's efficient, high-quality, centralized print production facility for production on Xerox DocuTech® digital publishing devices
- Email the customized sales guide directly to their customers as a PDF file

The solution involved Web design, application architecture and development, automated archiving and off-site Web hosting.

It was launched on time and on budget for a fixed project price.

The Results

Shortly after its introduction, the Web portal was adopted and actively utilized by 100% of the company's regional group sales offices.

The solution helped Guardian's group sales representatives customize easy-to-produce sales guides for their prospective customers, which increased the effectiveness of their sales calls. The popularity of the solution with the sales organization in turn helped Guardian:

- Improve group sales force productivity and effectiveness by speeding the delivery of highly relevant and targeted communications to their prospective customers
- Eliminate document obsolescence
- Quickly update collateral on a quarterly basis
- Improve control over branding and compliance
- Reduce reliance on pre-printed inventories
- Reduce printing, shipping and storage costs

The successful launch of the Web portal expanded the company's longstanding relationship with us and introduced Guardian to other services available from Xerox.

Case Study Snapshot

The Challenge

- Inability to produce customized broker sales guides
- Document obsolescence
- Slow time to market for collateral delivery
- High costs for storing and distributing pre-printed collateral

The Solution

- Xerox customer communication services
- Easy-to-use Web portal providing instant access to a comprehensive online portfolio of sales collateral
- A single, reliable provider for Web design, application architecture and development, automated archiving and off-site Web hosting
- A cost-effective, outsourced service solution managed by Xerox

The Results

- Highly relevant, targeted customer communications
- Rapid acceptance and utilization by 100% of Guardian's regional group sales offices
- Real-time managed content eliminated document obsolescence
- Improved industry compliance and management control
- Reduced printing, shipping and storage cost

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