

Large insurance underwriter ensures better customer service with managed document and print from Xerox.



Our Challenge

Documents are a critical part of the service that a large European insurance underwriter provides for business partners in the bank assurance sector. Xerox provides centralised printing for those partners from its offices in Ireland, outputting thousands of forms such as customer claims forms. This process is known internally as document transaction, and it involves personalising the forms for each of the insurance underwriter's partner organisations with the appropriate letterheads and information, and connecting with each partner's database to match it with the appropriate customer information and details relating to the claim.

The insurance underwriter's previous document handling system had been taking too long to process documents. Time was further added to the process because reporting was a manual process that involved various operations teams creating spreadsheets in order to track how many and what types of claims letters or policy documents had been sent to customers on a daily aggregated basis. With no closed loop and no cross checking, errors were often spotted only when the customer received the letter.

Our Solution

In 2010, the underwriter decided to review and improve its document transaction model, in order to speed up the turnaround time for processing documents and enable them to provide a good customer experience. Following a competitive tender, Xerox won the contract to deliver managed print services including a standardised and consolidated device fleet. Under the terms of the agreement, Xerox placed a technician permanently on site at the firm, to handle proactive monitoring and maintenance, supplying replacement consumables before the devices run out, and ensuring that a reliable print service is available to staff to avoid document-related downtime.

The document composition solution is a key element of the contract, and it is now successfully deployed across the underwriter's European business, serving 15 countries from the facility in Ireland. Previously, limitations in the older system meant that it was only deployed for half of those countries.

Our Results

The firm has more than 600 document templates that need to be maintained and kept up to date. As policies and claims get logged on the underwriting system, letters get sent out to policyholders and claimants. The Open Print solution from Sefas is able to pull a series of keywords such as policy number, premium, claims value and insert them into a customer letter as appropriate, which allows data from the system to populate automatically. Open Print also allows much greater flexibility for making any changes required. Internal staff IT resources have also been freed up to take on more productive work than overseeing changes to templates. Xerox now handle the centralised system, which is an upgrade on the older, more laborious system that was in place.

"Now, it's easy to produce a PDF and send it out to our operations staff to approve. For example, there are standard changes such as headers that can be changed across templates because these are generic in some countries," says a company spokesperson.



Executives at the insurance underwriter now have the ability to see previews of their documents in a more user-friendly fashion, to test sample letters and make changes to document templates quickly and easily.

The process of testing the documents prior to a large print run has also been simplified and the risk of errors has been significantly reduced. In addition, because less time is needed for testing, this has had a knock-on benefit of lowering print-related costs for the firm.

Throughout the project, Xerox provided their expertise consulting with the underwriter on issues such as output of different company logos. “The level of service is very good from Xerox. We’re

working very well together in terms of changes that need to be done and they would advise us on any issues,” says the spokesperson.

Reporting has greatly improved, giving the underwriter full visibility and transparency of what documents are printed on a regular basis. This process also flags any jobs that may have been sent to print but not completed, so potential errors are caught much earlier.

Most importantly, the faster throughput of documents has led to improved responsiveness for the firm’s partners, ensuring better service and more satisfied end-customers.

At a glance

Managed print services contract delivered by Xerox standardised on a specific printer model throughout the firm’s Irish site, while dedicated on-site remote support and proactive device monitoring has increased uptime.

- Faster turnaround times for processing customer documents
- Improved data protection
- Full visibility of print activity
- Predictable and transparent print and scan costs
- Increased productivity and user satisfaction