

## CASE STUDY:

Sefas helps insurance leader  
enhance customer experience  
across every touch point



“ Premiums batches used to take days to process, with Sefas it takes minutes, leading to customers receiving their letters earlier. ”

## Customer Experience

The world leader in insurance prides itself on providing outstanding service to customers. Indeed, its dedicated Customer Experience team is focused on bringing the 'voice of the customer' into the organisation. This is made possible by taking a customer-centric approach and having a single IT platform. Specialist support and coordination is provided locally from the company's world-class International Service Centre.

“ We pride ourselves on being there for our customers when they need us. ”

“Our people offer the right guidance and support which results in a faster, simpler and easier claims experience for our customers. We work hard to evolve the customer journey to make it as simple as possible across every touch point.”

## Print is a key touch point

Sending out timely and relevant communications is critically important for the insurance leader in order to achieve and maintain its customer experience standards. The company produces approximately 2 million documents per annum (30-40% on-demand) and has around 800 document templates (including language variations).

The operations teams (Premiums and Claims) were challenged with the preparation and printing of letters in countries where there was a low volume print requirement, which was typically unstable in letter and content structure.

The insurance company, and its print outsourcer, recognised that the existing customer communication management (CCM) solution was not 'fit for purpose' and often 'fell over', causing downtime.

“The low volume print tool was affecting the business and operations, which undermined confidence in the solution.”

“It often took more than a week to set up new customer templates, and there was little or no control over them, nor any management reporting.”

This lack of control, together with the inability to re-use template content, meant that the operations team had to create new templates each time they needed to create a letter type. “We very quickly realised that we were going to have to manage thousands of templates, which was going to be a maintenance nightmare.”

## Solution selected

After evaluating several suppliers, the insurance company selected Sefas's Customer Communication Management (CCM) solution, against some very challenging criteria:

- Scalability and reliability - the solution had to be highly available due to the nature of the insurance business and its scale across Europe.
- Production Control - it had to provide the ability to track and audit mail pieces created centrally through provision of enterprise automated document factory (ADF) principles. This approach would reduce the risk of 'double packing' and provide reporting and audit trails.
- A flexible design environment
- The ability to easily add terms and conditions
- The ability to re-use content
- The provision of impact analysis

## Component-based solution

Sefas's CCM solution consists of a number of components which are integrated to meet the insurance leader's exacting requirements and existing infrastructure.

**Designer** is a browser-based interactive tool used to create document templates.

**Designer Compose** completely manages several stages of the document lifecycle, from document template design to tests that precede the production phase. A drag-and-drop GUI is used to develop document templates, facilitating rapid template creation.

**Designer Interact** is a document generation tool that is seamlessly integrated into the organisations insurance systems to enable edit/preview of documents. Users in branches connect through an existing insurance system to generate the edit/preview. Sefas also provides an authentication security module.

**Producer** is the enterprise Automated Document Factory (ADF) command centre for production in which documents are automatically batched together, the print file is produced and printing is then managed by the branch network, central printers or external printers. Archive copies are also created. In addition, 'online' (on demand, no interaction) print requests are accepted through Web Services and batch files are rebatched and composed. All documents update a central record in the insurance system through status updates and Producer provides a full audit trail.

## Pan-European rollout

The Sefas solution supports the Premiums and Claims operations teams in the preparation, printing and distribution of letters for customers in countries who were using the previous low volume print solution. The Sefas solution has been installed in the UK, Ireland, Italy, Portugal, Denmark, France, Finland, Sweden, Norway, Germany and Switzerland, and is available across both print and electronic channels.

### Key benefits

The leading insurance company is realising key benefits from Sefas's solution, including:

- Improved operational productivity
- Reduced costs - postage, printing and stationery
- Enhanced utilisation of equipment
- Less dependency on IT resources
- Improved processing speeds
- Consistent messages communicated across multiple channels
- Enhanced customer loyalty
- Improved response rates
- Increased cross-selling opportunities.

In addition, the organisation has been able to reduce the number of letter templates from 1,300 to just 700 using Sefas's solution. The reusability of content across different templates and less maintenance of the templates – increasing efficiencies and reducing the cost for operations.

## Team Feedback

There has been great feedback on Sefas's solution from the teams that work on producing letters for the insurance organisation's customers:

"The Sefas solution is stable and reliable and provides us with an improved structure and templates and more controls to enhance the quality of the letters, which enables our teams to provide a better quality letter more efficiently," said the Client Services Director.

Customer Operations & Regional Service Improvement Manager added: "The structure and consistency of the letters with Sefas is much more professional, leading to an improved customer experience."

"From a support point of view, Sefas's CCM solution is rock solid. Being more efficient whilst providing customers with better quality letters is a great result." IT Services Manager.

## CCM Challenges

## Value of Sefas

Stability and long recovery times

Sefas's CCM is highly reliable, scalable and available 24x7x365.

Exposure to data protection breaches by sending letters to the wrong people. (This lack of production control could result in large fines).

Production control through camera-based systems and integration with Print Outsourcer's effectively eliminates breaches of FSA regulations, providing peace of mind and automated processes.

Taking a week to set up new templates

The collaborative nature of the Sefas design environment means that objects, such as paragraphs, addresses, etc. are stored centrally in a database, making it much easier and faster to create new templates, taking hours rather than weeks.

Lack of imposition tools lead to increased time to print to different letter sizes

A fully integrated imposition tool reduces the time needed to line up larger A3 documents, eradicating errors.

Lack of control over the template creation process

Full control over template design and creation with audit trails means that supervisors know who has created what and when, providing far better control and audibility.

Lack of reporting meant no traceability and little Management Information

Production control provides MI and audit trails of all document packs, allowing management to create reports.

Letter production was not integrated with the archive system

Sefas's CCM solution can be integrated into archive systems allowing a360-degree view of customer correspondence, so call centre agents can view the exact copies of letters that were sent to customers. This in turn means faster customer resolution times, cheaper calls and more efficient call agents.

Inability to reuse T&C's across templates meant they had to be recreated each time

Through the collaborative nature of the Sefas solution, T&C's and other objects within documents can be re-used many times across multiple documents. Any changes to them can be made in one place and then these are concatenated across all templates that need amending. This saves time and means that template design is efficient and effective.

### About Sefas

Sefas is a leading provider of software for creating, producing and managing personalised customer communications. Sefas software suite allows users to create, transform and enhance customer-facing documents, across multiple channels, including print, email and SMS, with real time tracking and interactive management. Learn more about Sefas at [www.sefas.co.uk](http://www.sefas.co.uk).

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