



## Mid-sized Life Insurance Company Improves Customer Service with Napersoft CCM

*“Napersoft’s extensive experience in the insurance industry is a real advantage. They clearly understand our processes, and with Napersoft CCM, we achieved our top priority – to improve the customer experience.”*

Assistant Vice President  
Information Technology



### **Background:**

A 100 year-old, mid-sized life and disability mutual insurance company

### **Goals:**

Improve customer service by delivering timely, high quality correspondence and other documents to customers

### **Solution:**

Implement Napersoft CCM for all document creation and distribution

### **Results:**

Improved customer service, improved internal efficiencies, and lower postage costs

### **About the Life Insurance Company**

This mid-size life and disability insurance company has annual net premiums of approximately \$150M and has stood the test of time. In fact, they celebrated their 100-year anniversary in 2010. They offer products and services for middle-America, or as they put it, they are: “Working hard for the hard working.”

Being in business for 100 years is an indication that they are doing something right. One area of success has been their strong focus on customer service. They pride themselves on their personal touch, honesty and integrity. With a long track record of performance, their policy owners and agents value the personal service that they deliver every day.

### **Improving the Customer Experience**

Their focus on constantly improving customer service prompted them to find new ways to improve production and distribution of customer correspondence. Old methods of generating letters from a mainframe computer were terribly inefficient and in some cases produced correspondence that was not pleasing to the eye. They wanted to improve their customer service by sending correspondence out quicker and producing better looking, higher quality documents.

*“Without Napersoft CCM it would be difficult for us to establish and maintain the level of responsiveness that our customers have come to expect from us. Our customer service teams are impressed by the time they save using Napersoft CCM to deliver timely and high quality correspondence to our customers.”*

*Assistant Vice President, Information Technology*

### Customer Communication Management

After searching for a solution and researching alternatives, Napersoft's Customer Communication Management (CCM) solution was selected based on Napersoft's extensive experience in the Insurance Industry, ease-of-use, ease-of-integration and functional capabilities to automate the correspondence creation process and create great looking customer documents.

Napersoft CCM has been implemented to handle both structured (batch) and interactive documents across multiple departments including policy services, sales & marketing, and underwriting, and will soon roll-out to the benefits (claims) department.

#### Contact us today for more information:

**1-800-380-1000 USA**  
**1-630-420-1515 International**

**Napersoft, Inc.**  
**40 Shuman Boulevard**  
**Naperville, IL 60563 U.S.A.**  
**[www.napersoft.com](http://www.napersoft.com)**

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### Automated Document Generation

Overall, Napersoft CCM is used to generate over 2000 documents per day and to maintain over 1000 document templates. Using Microsoft Word, business users can easily create and maintain Napersoft CCM's document templates.

Employees are able to work directly within their business application screens and pick the letter they want to create from on-screen menus. Napersoft CCM pulls information from the mainframe application, creates and formats the letter, and sends the letter to designated printers automatically without further intervention from the employee. Napersoft CCM also automatically sends a copy of all outgoing letters to the company's enterprise content management (ECM) system so that all policyholder correspondence can be archived and viewed together.

### Results

Napersoft CCM allowed the company to significantly improve efficiencies. The current solution has improved the ease of creating and maintaining templates and improved processing efficiency allowing business department resources to have more control, and IT resources to focus on other tasks.

One key benefit of Napersoft CCM has been its overall ease-of-use. The system runs with very little involvement from IT. Business department resources have been able to create and maintain their own document templates. And, it has required very few resources to create the templates – only 1 primary person from each department. In fact, each department has been very enthusiastic to change from their old ways to the Napersoft CCM system for their document creation and distribution needs.