

Case Study: Legal & General
Industry: Insurance | Solution: DocOrigin

Legal & General America Chooses DocOrigin

Single point of control over 4,000 document templates to ensure a personalized, highly professional communication with millions of American policyholders.



Legal & General America is a top 10 provider of term life insurance in the US. The nationally recognized market leader in the individual life insurance industry is trusted by millions of American policyholders, and part of the Legal & General Group.

Challenge

Legal & General America, as a client of ProTechnology, had a number of different home-grown business applications running and generating data. To streamline the process, Legal & General America needed to consolidate all these data streams to one single point of control, standardizing the automation process.

At the same time, the company was looking to implement multi-channel print and digital document delivery, modern customer engagement capabilities and centralized document management.

Legal & General America is on a mission to provide affordable financial protection to a new generation of Americans. The insurance provider works with two companies, running under the name of Legal & General America - Banner Life Insurance Company and William Penn Life Insurance Company of New York. As a nationally recognized market leader in the individual life insurance space, the company implements socially responsible business practices that allow to give back to the community and minimize their impact on the environment. Legal & General America is an important part of the worldwide Legal & General brand.

Initial situation

With hundreds of employees in the Urbana, Maryland headquarters, remote employees across the country and millions of American policyholders, Legal & General experienced a continuous and rapid expansion of document-related demands.

In an effort to automate document creation, production, omni-channel delivery and maintenance of documents, the company hired ProTechnology to migrate all legacy documents to DocOrigin and replace the sunset Adobe software solutions. ProTechnology installed and implemented DocOrigin document generation and Business Communications Center® software. With the combination of ProTechnology's experience, DocOrigin's rapid document migration and master document template migration features, they were able to reduce the number of document templates by more than 40%.

Selection requirements

The company began searching for an enterprise class document generation solution - one that would allow them to cut the high labor costs by creating smart account statements, claim forms, policies, cover notes, statements of fact, letters, quotation document sets and other insurance documents with data driven logic. The solution needed to allow content experts to create and maintain documents and lock down regulatory language. In addition, it was critical that the new software could consume the existing, proprietary Adobe Central Field Nominated data as well as new XML data being produced by their core software.

Solution

DocOrigin has not only streamlined the creation and maintenance of document generation processes, but it has dramatically decreased the time required to generate documents while improving their overall quality.

Results

- Reduced migration risk with re-use of proven methodologies and replacement solutions.
- Eliminated human errors and brand integrity by using data directly from their leading business systems.
- Created accurate, reliable document templates with minimal staff involvement.
- Sped up document generation processes by using a modern solution with an installation on a separate server, that doesn't slow down the business systems at peak times.
- Ensured, *Integration Without Modification™* with the company's business applications, i.e. no change orders to the existing business software.
- Improved document design and brand integrity in all document types, such as account statements, claim forms, policies, cover notes, statements of fact, letters and quotation document sets.

Based on their company's fast growth, Legal & General America, as a client of ProTechnology, searched for a fast solution with an industry-proven production reliability. The solution needed to handle the existing complicated data flow from all the business systems, and could also respond to the future modernization of insurance demands.



The Solution

Legal & General America assigned an internal team to investigate their market opportunities. They were pleasantly surprised to learn that DocOrigin could provide the needed value, by being installed complementary to their homegrown business systems without making any changes to them.

DocOrigin is designed to handle composition and production of documents by merging data with templates. The solution pulls information from data systems to automatically generate precise, reliable documents with minimal staff involvement. The company chose DocOrigin for these primary reasons:

1. **Automated template migration.** The solution provided automated migration of their old document templates, which saved a significant amount of man-hours in the development process. Furthermore, DocOrigin could be run in parallel with their current, sunset document application to support a gradual migration of their templates.
2. **Flexible template design.** With DocOrigin template designer, users can easily create any document type, like statements of fact, letters, quotation document sets and other insurance documents to look exactly the way the designers want them. Flexible design capabilities also mean that employees will spend much less time on maintaining existing and creating new templates.
3. **Smart process automation.** DocOrigin automated the generation, processing and distribution of the company's 4,000+ document templates, each of which had about 200 dynamic parts, which depended on the incoming data from the Legal & General's homegrown data systems.

Benefits

DocOrigin reduced document inventories, development and processing time by over 80%, and document template maintenance costs by over 60% a year. A total return on investments was achieved in less than 12 months.

Implementing DocOrigin as a complementary solution to the company's homegrown data systems allowed them to bring transparency and accuracy into everyday processing and reduced the document template quantity of approximately 4,000 templates by almost 50%. With millions of American policyholders, which number is constantly growing, the life insurance market leader can finally benefit from a solution that not only meets their current business needs in document processing automation and customer engagement, but also addresses the challenges of the future.



DocOrigin

From the creators of JetForm/Adobe Central Pro

ECLIPSE CORPORATION
Call +1.678.408.1245
info@EclipseCorp.US • @EclipseDoc
www.EclipseCorp.US

1222 SE 47th Street
Suite 211
Cape Coral, FL 33904

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4. **Omnichannel document delivery.** Implementing DocOrigin helped Legal & General America to not only meet, but exceed the increasing consumer demand for a personalized, seamless and integrated experience. By switching to DocOrigin, the company could benefit from transforming their former paper based communications into personalized, digital experiences. DocOrigin is able to deliver documents via various print and digital channels, such as: email, HTML, customer portal, fillable forms with e-signature, print, PDF, SMS, Fax, Messenger and more. This solution also supports industry-standard print formats: PostScript®, PCL, Zebra ZPL and more.



Success and plans for the future

Legal & General America has relied upon DocOrigin to solve a variety of complex business problems while improving operational efficiencies, which directly translated into positive financial results for the company.

By replacing their legacy solutions, the company was able to automate the processing of a large number of document templates and create a single point of control to ensure brand integrity, regulatory compliance and usage of the latest approved document template versions.

The company sees information technology and process automation as important assets, which will help Legal and General's employees to stand out from the competition by meeting the challenges of the ever-increasing information demands in a continuously and rapidly increasing number of policy holders and their increasing consumer demand for a personalized, seamless and integrated experience.

Legal and General America is a client of Eclipse Corporation's partner ProTechnology. Eclipse is the home of DocOrigin® and Business Communications Center®.