

Customer Use Case

CCM GATEWAY FOR ALFRESCO

Customer Communications Management for Insurers

Overview

Insurance companies need to store and manage millions of documents, including internal documents and customer communications such as policies, quotations, statements, reports, renewals, reminders, checks, letters and more. In order to be in compliance with local regulations, this material has to be retained for many years, resulting in terabytes of stored data.

Challenge

A typical insurer will have documents stored in multiple formats, often spread across different archives, including legacy systems, resulting in disconnected silos of information. Although these are vital documents, and are an essential part of day-to-day operations, accessing and managing information is difficult and inefficient.

Solution

An insurance company decided that they needed to consolidate and standardize on one platform to reduce storage requirements, gain efficiencies, and deliver communications in the optimal formats for archiving and e-presentment. A critical requirement was that the process of converting and migrating the documents to the new platform needed to be low risk and automated.

Crawford Technologies CCM Gateway customer communications archiving solution enables archiving of high volume customer communications which originate as AFP, PDF or other print formats, including legacy formats, and automatically convert them to PDF/A for archiving.

For the insurance company, CCM Gateway day forward workflows were configured to capture content from a shared file system. The no-burst model in CCM Gateway was chosen to store content with one large batch file and use content-less reference objects for individual documents. This optimizes the storage of content by ensuring that common resources like fonts are only stored once per batch.

In order to deal with the existing archive, and its blend of formats, it was proposed that source content be converted to PDF/A, an open and long term solution backed by ISO standards. Content and indexes were extracted from legacy archives, and over the next months all content was automatically converted from AFP to PDF/A. As part of the migration workflow, individual steps in the process were audited to ensure that all content was being migrated correctly. This ensured that all content was accurately moved to the new system.

Results

Over 100 types of documents and over 100 million records, with a mix of customer facing and internal documents were successfully migrated. The consolidated archive now supports over 4,000 internal users and runs approximately 20 archiving jobs per day, with 40,000 new documents added to the archive each day. Customer service staff now have instant access to customer communications, which allow them to handle inquiries more efficiently. Well over 2 million customers are able to access communications and records via a secure self-service web portal, saving administrative time and money.