

Quadiant Inspire Enhances Correspondence Workflows for Pacific Life



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Project at a Glance

Challenge

Pacific Life wanted to migrate from an inflexible and outdated mainframe customer communications management (CCM) approach to a single, robust CCM platform that could transform workflow for on-demand correspondence; enhance document control for improved branding, compliance and customer experience; and provide e-delivery capabilities.

Solution

Quadiant Inspire was chosen to consolidate letter templates and automate correspondence processing; provide robust design, version control and automated approval features, and enable multichannel output.

Results

Significantly streamlined correspondence processes that reduce manual labor; improved version and brand control and e-delivery capability that will reduce the organization's print and mail costs and enhance the customer experience.

Offering insurance since 1868, Pacific Life Insurance Company and its affiliates provide a wide range of life insurance products, annuities and mutual funds, and offer a variety of investment products and services to individuals, businesses and pension plans. Pacific Life counts more than half of the 100 largest U.S. companies as its clients.

Pacific Life's Retirement Solutions Division offers and administers fixed and variable annuities and mutual funds on behalf of individuals desiring to use them as part of a retirement income strategy. For more than 20 years, the Retirement Solutions Division has primarily been using mainframe based solutions to produce its customer communications. The organization decided that for its business to keep pace with a changing marketplace, it needed to upgrade to a single platform that could deliver the capabilities that would enable it to enhance efficiencies, reduce risk and improve time to market.

"With our mainframe IT environment, we were putting in a lot of short-term fixes and workarounds to achieve the functionality our Service team was requesting," said Brian Pead, assistant vice president, annuity applications, Pacific Life. "We wanted a state-of-the-art solution that would enable us to more effectively manage all of our documents and expand our capabilities, such as sending communications electronically over different communication channels."

After vetting potential solutions through an extensive RFP process, Pacific Life chose Quadient Inspire. To earn Pacific Life's business, Quadient provided Pead's team with an in-depth proof of concept to validate the robust features available with Quadient Inspire's Interactive, Automation and Designer components. The Pacific Life team was not only impressed with these features, but also with Quadient's overall commitment to the Quadient Inspire solution and its willingness to send several developers and consultants to support the proof of concept and develop solutions based on Pacific Life's actual workflows and documents. Having successfully completed the real-world use cases, Quadient Inspire stood out as a true leading-edge solution that would help Pacific Life take its customer communications to the next level.

Streamlining processes for customer correspondence

Pacific Life's on-demand letter workflow was first on the list of transformation projects with Quadient Inspire in place. The company's customer service representatives (CSRs) had been manually generating client letters from a MS Word based tool. This process also required the CSR to prepare the letter for mailing as well as archiving. Letter archiving, completed by the document control center, was also a manual process.

"The way we were generating on-demand letters was inefficient and we recognized the need for more advanced systematic controls to ensure we were sending properly vetted documents," said Pead. "Quadient Inspire has enabled us to automate the process so that our CSRs can do what they do best—provide industry leading support to our clients, eliminating the need for CSRs to be involved in handling the letters. Quadient Inspire allows a CSR to generate pre-formatted letters with pre-approved text options that are consistent in their look and content and to submit the letter for printing directly to the mail room, with automated archiving. The mail room manages the printing and mailing, and has removed the burden from our CSRs entirely. We currently process a few hundred on-demand letters per day and are saving five minutes per transaction, which translates into approximately 16 man-hours saved every day."

Modernizing capabilities for improved customer experience and reduced costs

With Quadient Inspire, Pacific Life has also been able to reduce the number of document templates it uses by two-thirds and has greater functionality within the remaining templates to generate different types of output. "Historically we have served a demographic that preferred receiving paper documents. Going forward, our clients will expect to receive correspondence and access to their account information over a variety of communication channels. Quadient Inspire's robust capabilities and the company's excellent professional services and support teams are making that transition extremely smooth for us," said Randi Gordon, director, customer communications management, Pacific Life.



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—Randi Gordon, director, customer communications management, Pacific Life.

Pacific Life also plans to use Quadient Inspire to generate transaction confirmations and offer e-delivery capability for the thousands of transaction confirmations it sends out daily. In addition, Pacific Life plans to ultimately generate all account statements from Quadient Inspire. The correspondence will be redesigned with an updated look and feel, with an emphasis on consistency between document types as well as offering expanded e-delivery options. The project is ongoing and will involve the integration of multiple back-end systems. “With Quadient Inspire, we have leading edge capabilities in terms of how we present customer data and deliver content to our customers. Moving some of the large volume to e-delivery and with a focus on generating print ready output to reduce print vendor programming, will also significantly reduce our costs,” said Gordon.

Overall, Quadient Inspire has increased the control Pacific Life has over the customer communications it sends out and significantly improved the user experience for its employees.

“The automated, template-based workflow and approval process for our correspondence has dramatically improved our brand consistency and significantly improved the efficiency of our Service team support,” said Gordon. “And we recently asked our internal users about their experience so far with Quadient Inspire and we were very excited by the positive responses. They can hardly believe how much easier it is for them to process their daily correspondence and how much more they can accomplish.”

“Quadient Inspire has been a real game changer for us,” Gordon concluded.

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