Insurance Underwriting Firm Centralizes and Streamlines Data for Collaboration

Since its founding in 1930, Protective Insurance has specialized in marketing and underwriting insurance for the transportation industry. Today, Protective Insurance is a diversified holding company with seven different operating entities within its structure.

The Situation

Protective Insurance specializes in marketing and underwriting insurance for the transportation industry. Through its many property and casualty insurance companies and brokerage firms, the company accepts risks covering more than a dozen different specialty products and services and provides brokerage services for all kinds of risk.

As a premier property and casualty insurer for the transportation industry, Indiana-based Protective Insurance handles millions of documents in its policy issuance, billing, and claims departments. After years of growth, the company recognized the need for a new streamlined solution for document imaging as well as classification and extraction. They wanted this solution to be built upon a new centralized content hub that was both easy to use and collaborative and allowed for the seamless migration of all their existing content into that repository.

Brian Gray, Managing Director of Application Development at Protective Insurance states, "Organizationally, we were divided into silos by product line and over the years, we had created mainframe-based solutions that were also in silos. As a result, we ended up with six different policy administration systems, six different claims systems, and six different billing systems." In addition to the content silos, Protective Insurance' legacy imaging platform had been acquired and discontinued by Oracle, who did not have a migration path for the company to transfer content to a new product.

PROTECTIVE INSURANCE

Customer
Protective Insurance

Industry
Insurance

Partner
Zia Consulting and Alfresco

Process and Solution

After evaluating several solutions, Protective Insurance chose Alfresco as its new enterprise content management platform. The company partnered with Colorado-based Zia Consulting to help them migrate all their content from Oracle to the Alfresco platform and also deliver a new intelligent capture solution utilizing Ephesoft Smart Capture®.

"We told Zia that if they could migrate 10 million documents in 30 days, we would sign a contract with them for the full project implementation," Gray said. "They migrated 10 million documents in less than 7 days – and all during non-peak hours."

Zia then spent the next few weeks in an assessment phase, learning the business of Protective Insurance both remotely and on-site. They also spent time talking to internal users of the platform about their unique content management needs.

Ryan McVeigh, VP of ECM Solutions and Sales at Zia said, "Through our Initial Consulting Engagement (ICE) we delved into how their daily operations worked so that we could create a customized solution. Because of our ability to understand how the system needed to perform, we were able to increase user adoption making the whole solution function properly and give them great results."

"We knew if we wanted to deliver something that business users valued, appreciated and would actually adopt we had to turn this into a business initiative and not just an IT initiative," said Gray. "We didn't just want to implement a new system, we wanted to revolutionize the way we do business and really take a look at our processes internally."

The Results

Today, Protective Insurance has begun a phased migration of its claims library to Alfresco, which it expects to complete in Q3 of this year. Then, the migration process will begin for the company's other primary lines of business. Alfresco will serve as the single system of record and Ephesoft will continue to play a critical role in document capture.

According to Gray, "All other systems will point to Alfresco, which will enable people to work in their native environments while leveraging the back-end technology and benefits of the platform. The vision and key to our success is engaging our business users."

From a technical perspective, the company wants to leverage open standards of protocol so that they are not boxed into a customized solution. They also plan to implement a "frontend data capture" process to reduce the some 300,000 printed materials generated by the claims department each week.

"One of the big initiatives for next year is electronic delivery of content," said Gray. "Today, we literally print millions of pieces of paper that get mailed out to our clients. We are looking at offering secure document enablement and access through Alfresco to our customers and policy holders." Once content has been migrated from the company's business departments, the next step is centralizing content in various SharePoint sites and shared folders into Alfresco and expanding internal workflows to include tracking and records management.

Advantage Technologies
866-730-1700
info@atechnologies.com
www.atechnologies.com

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