



Hyland™



INSURANCE | CUSTOMER SUCCESS

THE CUSTOMER

A global insurance organisation's Australian headquarters has turned to the Alfresco content services platform to digitise millions of documents, saving the company significant costs associated with storage, as well as increasing efficiency and response times.

The organisation, with thousands of staff across Australia and New Zealand, is one of the region's largest general insurers. They deliver a wide range of personal, commercial and corporate insurance products and services, holding several million policies across the country, including many of the largest organisations.

THE CHALLENGE

The move to Alfresco initially came about as the result of a physical move into new corporate offices in Sydney.

Following the decision to move, the insurer evaluated the volume of paper files that would require rehoming and opted to look into digitisation as an alternative. With over 30 years of documentation, there were more than 100 million individual pieces of paper to be considered, each of them potentially important to the smooth running of the organisation.

The digitisation process would require scanning each document and moving them into a repository. However, rather than a static storage facility such as a data centre, the insurer decided to use a content services platform. This would enable team members to search for files quickly and easily, effectively moving the information "trapped" within them into "live" data.

Collating and storing the old, paper-based system had been expensive — and highly inefficient. Each time a customer file was required, staff members would have to search for it manually. Following the retrieval of the file, it was then necessary to manually search for the required information WITHIN that file. This process made collaboration more difficult, as individual team members had to present the information to stakeholders in person — often on a case-by-case or ad hoc basis, which was also disruptive.

In the event that a claim went to court, hundreds of associated files were copied and distributed to legal teams by hand.

As the move to modern premises advanced to the planning stage, the organisation began to look at ways to reduce its dependence on physical storage by introducing electronic processes. This would enable fast, digital sharing of documents and foster greater collaboration.

The digitisation move required a means of centrally storing documents, enabling fast and easy access for all approved stakeholders.

The organisation also needed a solution that could integrate with existing systems such as Lotus Notes.

"In a paper-based system, having a file on your desk prevents anyone else from accessing it," a spokesperson from the company said at the time. "We needed a better working environment where people could share their documents and work together."

THE SOLUTION

After a rigorous, three-month evaluation, Hyland's Alfresco platform was selected because of its superior performance during the proof-of-concept and testing phase. The platform was chosen based on its agility and functionality. Since Alfresco is an open platform, the organisation's development team was able to integrate it with existing infrastructure — with very little impact on the architecture and digital environment.

The Alfresco platform will also scale infinitely within the insurer's ecosystem, which is a key component of the digitisation plan.

The insurance company deployed Alfresco in a matter of days. They used an external scanning house to digitise crucial paper documents and uploaded about 3,000 case files into Alfresco each day. In just a few months, almost 3 million documents had been loaded into the platform.

“We were deploying hardware on Friday, testing on Saturday, deploying the application on Sunday and employees were using it Monday,” the spokesperson said.

THE OUTCOME

Jump forward several years and the insurer has more than 100 million documents stored in Alfresco — and each is searchable and instantly available, wherever the staff member happens to be located. With remote work a necessity during lockdowns, this has ensured business continuity and seamless collaboration across teams and departments.

In-house retention policies are managed automatically through the platform, with claims and associated paperwork removed from the system and storage after a set period of time. Mainframe print jobs are now stored electronically, which means team members can search and extract historical information from documents in a

matter of minutes. The same goes for all digitised files, with once-static information now digitally available and placed at an employee’s fingertips with just the click of a button.

“Alfresco paid for itself in storage space right from day one. We can now keep copies of documents for a fraction of the cost and team members can easily find and retrieve them, which ultimately improves the customer experience,” a spokesperson from the organisation says.

Alfresco also provides the benefit of document preservation. The insurer handled a project for a client that included multiple asbestos claims. Historical documentation had been stored for upward of 40 years, making it fragile and not easily handled. Once the documents were carefully scanned and uploaded to Alfresco, employees were able to easily access and search the files, with no risk of further degradation.

Another benefit to the insurer is the capability of Alfresco to find historical documents through the metadata associated with each digital file. Regardless of how old the document is, the metadata provides an auditable, digital trail that allows users to precisely locate information anywhere in the system.

The insurer is now scaling up the number of users on the Alfresco platform, with licences more than doubling to approximately 5,000. Once the platform was migrated to the latest version, the organisation rolled it out to other parts of the business, bringing the same levels of functionality to new teams and processes.

The broader adoption is coupled with a more hybrid approach to document accessibility, providing users with the ability to access workflows via mobile devices such as a phone or tablet.

Ultimately, the large insurance company has saved employees a lot of time, while reducing the cost of physical storage. Files and documents are infinitely more searchable and actionable, and business processes are more efficient.

“With Alfresco, users have gone from taking 10-15 minutes to find and retrieve a document to just two seconds. It’s a well-oiled machine at this point,” the spokesperson says. “Alfresco now integrates with 12 to 14 of our other line-of-business tools and as projects come up with a document component or requiring a document management process, we are part of the rollout. Alfresco is really a part of our company backbone.”

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