



Modernizing Technologies with an Eye on the Client

Presenter:
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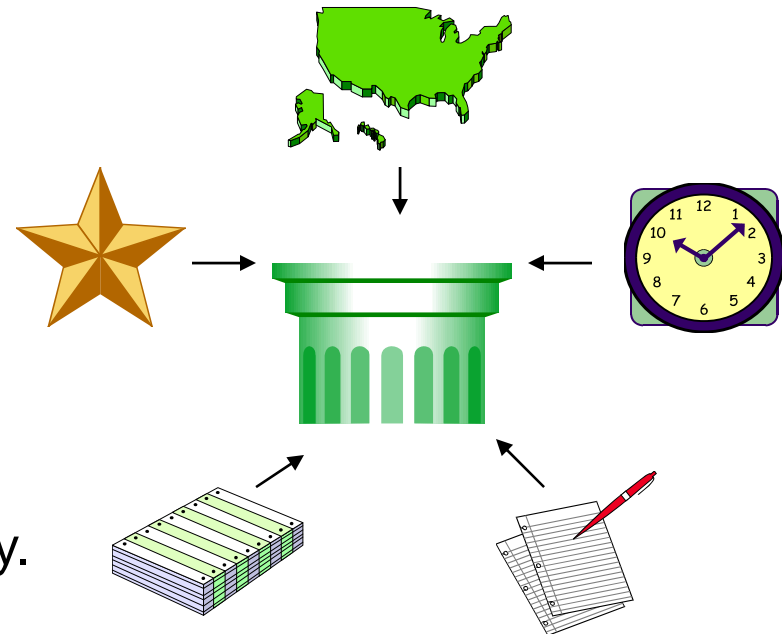
ACORD LOMA Insurance Forum
Thursday, May 15, 2008
2:15-3:00 p.m.

The Heart of the Business

Content is the deliverable of our business

The success of our business depends on getting the right content...

...to the right place,
at the right time,
in the right format,
in the right quantity,
with impeccable quality.



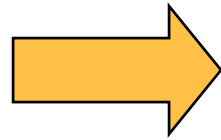
Content life cycle



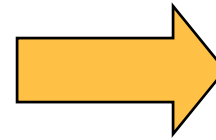
**2. Storage & Retrieval
(master)**



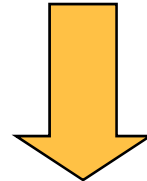
1. Create



3. Publish



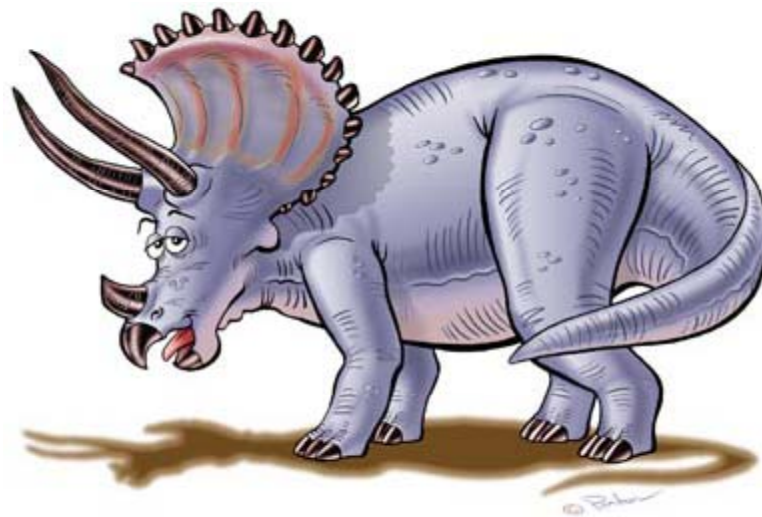
5. Distribution



**4. Storage & Retrieval
(Client)**

The way we were

- Microfiche and paper
- 4890 printers in Data Center
- One two-pocket inserter
- Documerge
- Print and Tag Commander



Print to Mail: 2002 - Regulus

- Standard envelopes
- Cover sheet
- 52% volume
- 5.5 million mail units, 41 million images
- Reduced eight FBL staff
- Technology, expert staff

Archive: 2003 - IBM FileNet

- Microfiche and paper files
 - No disaster recovery
 - Antiquated equipment
 - Staffing issues
 - Service issues

Archive: 2003 - IBM FileNet

- Microfiche - 679,025 jackets (approx 28.5 million images)
- Paper back file - 66,781 pages (2.2 million images)
- Day forward – 183K images/week
- Reduced 24 FBL staff
- Insource vendor

ECM defined

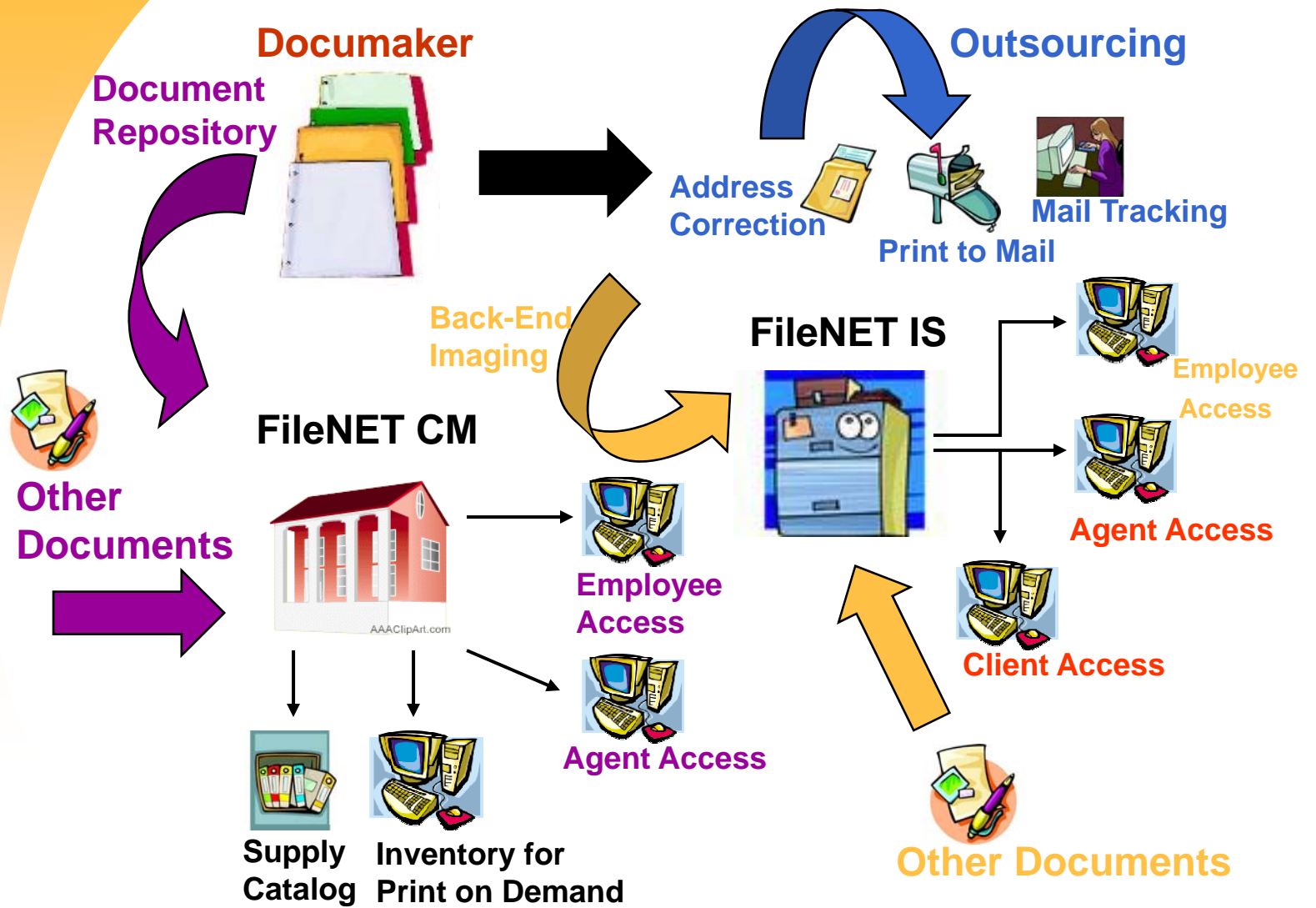
- Managing the content life cycle - from creation to publishing, to distribution, to storage and retrieval - in a consistent, predictable, and cost-effective way.
- Managing across a growing array of content types.

Goal: to integrate common software with efficient common and cost effective content management approaches.

Benefits of ECM

- Consistent and predictable outcome
- Uniform look
- Repeatable implementation steps
- Web-based and portable
- Disaster recovery
- Focused maintenance

ECM strategy



The document story

- Old technology
- Inconsistent look and feel
- Documents created in 14 ways
- Time-intensive to create and maintain
- Very limited capabilities for producing attractive and flexible end-product
- Five step process to view draft
- Manual collation
- Manage signature changes

What We Wanted

FBL needed a universal approach to develop and publish documents, which would:

- Improve time-to-market (reuse form language)
- Provide consistency
- Eliminate manual processing
- Allow incomplete documents to be returned electronically to business units for completion and submission for printing and imaging
- Position us to be Web-based and portable

Help!!!

- Called Skywire Software for assistance
 - Feasibility study: Jan 2004
 - Requirements, installation and pilot conversion: July 2004-April 2005
- Chose two complex documents to convert
 - Develop the base of our Document Development and Publication system (DDP)
 - Knowledge transfer in-house by working side-by-side with Skywire Software
 - Develop system standards
 - Develop and enforce document standards

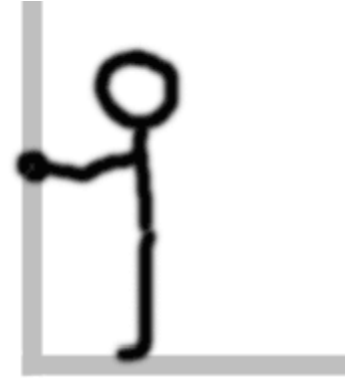
12 step document conversion program

“Road to smart documents”

1. Admit your forms have a problem
2. Get an inventory of forms
3. Adding detail
4. Restore your sanity
5. Getting samples
6. Identify differences between variations & products
7. Reviewing the DDP print formatting standards
8. Test matrix
9. Form conversion review
10. Review section add/update process for new and current sections
11. Test creation and publication process
12. Carry steps to future phases of document conversion

Pain before payoff

- Pain
 - Analysis
 - Know what you are going to do before you do it
 - Busting Up
 - Tedious & time consuming
- Payoff
 - Reusability
 - Accelerate the training process
 - System and document standards



DDP achievements

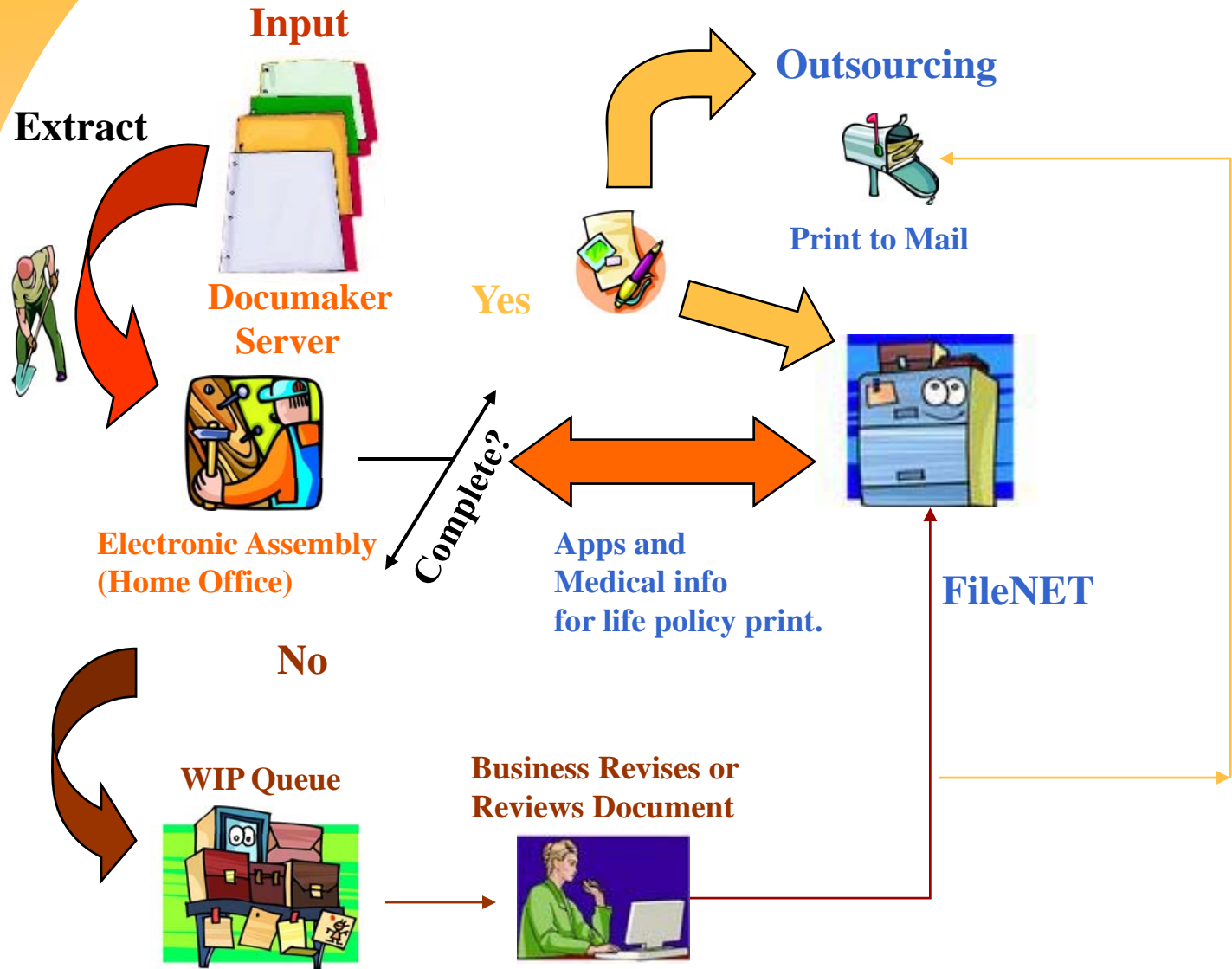
- All active policies converted: Oct. 2008
- 68% of all documents: Oct. 2008
- 75% time savings in state variation to policy forms
- 90% of policies produced without user intervention

“It’s already done.”

Five steps to No-Hands Print

1. Convert Documerge forms to Documaker
2. Convert other forms to Documaker
3. Integrate images into Documaker print stream
 - 90% of policies are fully automated
4. Implement WIP (work in process)
5. Print at Regulus

Publication Strategy



The future

- 2D bar code
- Intelligent forms
- Field office printing
- Electronic distribution
- Document Repository
- Agent access to images
- Client access to images

Guiding principles

- Vision and plan
 - Establish content standards
 - Collaborate with business
- Pilot
 - Select manageable program to gain experience on all components
- Roll-out
 - Use resources as available
 - Non-compete with priority business projects

Vendor How-To's

- Form a partnership
 - Collaborate and cooperate
- Must feel your pain
- Willingness to break the rules
- Great communication
- Equal give and take



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ECM strategy

