Meeting a requirement to condition multi-platform insurance documents for improved regulatory compliance and to standardise document output format with the long-term aim of centralising document production to an outsourced print and fulfilment company.

Ageas Insurance Solutions (AIS) is one of the UK's leading personal lines insurance brokers and is part of a successful and growing insurance group. With almost a million customers, AIS employs 500 people at its offices in Stoke-on-Trent. AIS operates three major direct personal lines brands, and also works with major brands wishing to provide insurance products to their customer base as an additional revenue stream and with brokers looking to outsource their personal lines business.

Project overview

AIS initiated the project with the long-term aim of centralising document production to an outsourced print and fulfilment company. AIS chose WML's DataGateway software for its capacity to condition insurance documents for improved regulatory compliance and to standardise document output format from multiple back office systems.

The initial stage of the project involved using WML's DataGateway software to condition documents for three of AIS's brands, to determine how this would affect performance, particularly in terms of improving document compliance and workflow.

After the trial period, the next stage was a full-scale implementation across AIS's portfolio of over twenty brands, with outsourcing to a dedicated print and fulfilment partner.

Converting the documents, produced using back office systems including CDL Classic, CDL Strata and T2I, into an industry standard format was essential to ensure that AIS would not be tied into any one outsource partner's proprietary production system.

Implementation

WML's DataGateway software was installed to condition documents for three of AIS's customer brands. The documents were produced from a CDL Classic back office system. The software monitored document content in real time, applying customer-defined business rules to collate documents and correct call centre errors, and converting the documents into a standard format for centralised print in house.

During a year-long trial using WML's DataGateway software, with volumes of up to 2250 documents or 31000 pages being processed each day, document workflow was greatly enhanced, with substantially fewer document reprints, reduced production staff utilised on fulfilling the three trial brands and overall better document compliance.

Innovative Technology

Following the successful trial, AIS decided to outsource all document production for print and fulfilment across their portfolio of over twenty customer brands. WML's DataGateway software was chosen to condition the documents, produced using a range of back office systems including CDL Classic, CDL Strata and T2I, into a standard format and to check document content for regulatory compliance.

In a phased project with demanding timescales, WML delivered a series of bespoke developments and per-brand tailored business rules to provide the functionality required for the print outsource workflow, working closely with AIS IT services staff to monitor performance at all stages.

WML's DataGateway software runs within a VMware environment, which means that it is flexible and scalable. By splitting the implementation of brands across several virtual machines, WML were able to create a system which is robust and reliable, and which can handle the large volume of documents produced across the AIS portfolio.

WML liaised with AIS's chosen print outsource partner to ensure that documents were delivered securely and were accompanied by metadata indicating a range of fulfilment parameters, such as stock and insert codes. WML's output batching feature was utilised to facilitate delivery of documents to the outsource partner.

Project outcomes

The initial trial period proved that using WML's DataGateway software led to significant enhancements in document workflow, with substantially fewer reprints, a reduced number of staff required for fulfilment and overall better compliance with regulatory requirements.

As a follow through, AIS decided to use WML's DataGateway software in the main print outsourcing phase of the project. As well as improvements in workflow and compliance, WML's DataGateway software offered the capacity to standardise document output from a variety of insurance applications.

> "Implementing the DataGateway solution will standardise our document production from multiple back office software products and improve document compliance. We can now present a standard document output format to our external print and fulfilment partners."
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> *Paul Newman, Head of Information Technology, AIS*

Over the course of the project WML worked in close partnership with AIS to deliver a flexible and robust solution that meets their requirement for improved document compliance and secure print and fulfilment outsourcing.