

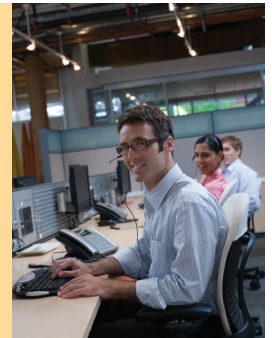
CASE STUDY

## Endsleigh Insurance

“WE HAD BIG PLANS FOR E2 ARCHIVE AND HAVEN'T BEEN DISAPPOINTED.”

Declan Shiels, Client Communications Executive

ENDSLEIGH INSURANCE IMPLEMENTS CUSTOMER COMMUNICATIONS MANAGEMENT SOLUTION WITH PITNEY BOWES GROUP 1 SOFTWARE



### Challenge

Endsleigh Insurance required a solution that could perform high-speed archive and retrieval of its business documents for compliance with FSA regulations, and to enable call centre and branch staff to handle customer enquiries personally and efficiently through the access of exact replica documents.

### Solution

Endsleigh Insurance and Pitney Bowes Group 1 Software have a long-standing history dating back to 1998 with their purchase of leading document composition technology, DOC1. In March 2003 Endsleigh became the first European company to purchase Group 1's groundbreaking e2 Archive and e2 Service solutions for integration with their own CRM software – insurance.net. The result is that 1000 staff members have real-time access to critical printed documents to provide optimal customer service.

### SUMMARY

#### The Company

Retail based independent insurance intermediary, Endsleigh Insurance was founded in 1965 in conjunction with NUS. The original business was focused on student insurance including motor, travel and possessions. The emphasis is now on the provision of insurance and financial products for career people. Endsleigh seek a lifelong relationship with their clients and therefore offer a full product range that starts with students and continues to retirement and beyond.

Since 1965 the retail network has grown considerably. Endsleigh currently operates 135 sales offices nationwide and three call centres that service in excess of 500,000 active clients.

#### The Background

Endsleigh Insurance and Pitney Bowes Group 1 Software have a long-standing history dating back to February 1998 with their purchase of DOC1. The objective was to convert Endsleigh's motor renewal invitations into DOC1. By June of the same year all client facing motor documents were being transformed – in all 18 separate documents were converted. In January 2001 the DOC1 property project was initiated, the remit of which was to convert all client facing property documents to DOC1. In August 2001 Endsleigh purchased Message1, Group 1's messaging system that enables marketers to create and manage sophisticated campaigns independently of the IT department. The entire Endsleigh

marketing department became Message1 users giving them greater involvement in the document design process. This led to the entire front letters of client documents being controlled by Message1. Finally in March 2003 Endsleigh became the first European company to purchase Group 1's groundbreaking e2 Archive and e2 Service solutions for integration with their own CRM software – insurance.net.

#### The Need for Archiving Technology

Endsleigh realised that it required a solution that could perform high-speed archive and retrieval of its business documents. This need arose from the confluence of three important business issues:

1. The company's branches and call centres needed access to documents when dealing with client queries as the documents are integral to understanding the customer while using insurance.net, Endsleigh's online real-time general insurance CRM software. Insurance.net was designed and developed specifically for the needs of Endsleigh's customers and staff working in customer facing situations.
2. The company realised that providing its client-facing employees access to identical replicas of client documents would build customer confidence by enabling advisors to convey relevant information in a timely and informed manner.
3. Documents are also invaluable in auditing issued business, which is critical to complying with Financial Services Authority's (FSA) legislation that regulate the sale and administration of general insurance.

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Pitney Bowes Group 1 Software  
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## “WE CONTINUE TO BE IMPRESSED BY THE USEABILITY AND CAPABILITY OF THE DOC1 AND E2 PRODUCTS”

Declan Shiels, Client Communications Executive

Additionally, the solution had to fully integrate with insurance.net, which covers all aspects of insurance management and processing for retail branches, call centres and the Internet. It includes integrated sales management with real-time performance tracking/analysis and full online payment processing, including direct debit set-up and card authorisation/collection. It also provides a single customer view of all transactions and communications across Endsleigh so that the customers are handled personally and efficiently.

### The Solution

Group 1 Software implemented e2 Archive on a single NT based server at Endsleigh's headquarters in Cheltenham. The DOC1 Rendering engine connected e2 Archive to Endsleigh software and used API calls to link with the Endsleigh application so that all documents are instantly accessible to all Endsleigh staff. Consequently, customer documents are retrieved nationwide across the WAN in less than two seconds.

The product is capable of loading up to 2.5 million pages per hour and handling over 1,000 look-ups and retrievals per minute in parallel. Endsleigh branches and call centres have a sub-second access to all policy documents and letters sent out to each individual clients regardless of archive and document size. The repository can store one to two million document pages on 1GB. Therefore Endsleigh can archive seven years of documents on a single server, eradicating the need for expensive computer output to laser disk (COLD) storage. Subsequently, more than 10,000 documents have been indexed and

added to the archive each day with immediate availability to client facing users.

The e2 Service solution takes the same print stream that is used for sending out the printed policy in the first instance so that the call centre/branch will always display exact replicas of the original printed document. Emailing a pdf of the document to customers is also possible. The result is that 1000 staff members have real-time access to critical printed documents.

The implementation of the archive solution means that Endsleigh's call centres can provide optimal service by increasing first call closure, reduce waiting times and resolving queries faster whilst improving collections and reducing labour costs.

In addition, e2 Archive and e2 Service has recently been connected to the Endsleigh web site so that individual clients can view their personal documents for product and motor products. As well as providing customers with the online convenience of accessing documents instantly and in the comfort of their home, the customer self-service element also helps to relieve pressure on inbound call centre enquiries.

### THE PITNEY BOWES GROUP 1 SOFTWARE ADVANTAGE

To retain a long-term relationship with the customer, from studentship and beyond, Endsleigh Insurance realised that enhancing the customer experience through efficient customer communications is vital in achieving this. Pitney Bowes Group 1 Software's e2 solution has been instrumental in providing the capability to enhance the use of insurance.net for both staff and customers. Subsequently, Endsleigh are committed to adding extended functionality to their CRM system.