

SUCCESS STORY

“Server is fast, efficient, stable, and robust,” states Giorgio Moioli, Senior Analyst Developer for EurizonVita.”

“I have used activePDF for almost three years and I am very pleased with the results we’ve achieved - producing a PDF from a Word file takes less than two seconds,” comments Moioli, adding that, “Server has been integrated perfectly into our applications.”

EurizonVita, a Leading Italian Life Insurance Company, Uses activePDF Server to Match Industry Trends and Increase Customer Satisfaction

Company: EurizonVita S.p.A.

Industry: Insurance

Product(s) Used: activePDF Server

Company Overview

EurizonVita is among the leading life insurance companies in Italy, offering a number of flexible policies to meet the needs of a wide variety of customers. The company also consists of EurizonTutela, specializing in damage insurance, and EurizonLife, which provides life insurance policies to customers throughout Ireland.

Business Challenge

Since its inception in 2004, EurizonVita’s goal has been to lead the insurance industry in innovation and customer service. To this end, EurizonVita agents work closely with each client to develop policies based not only on current needs, but also plans for the future. Striving to provide personal attention to each customer, EurizonVita currently sends well over one million letters each year – mailings which communicate important information regarding individual insurance policies. In the past, the process for creating and sending the letters to customers involved using a custom application to select the customer and type of letter being sent. On the back end, the application would populate a corresponding Microsoft® Word template stored on the EurizonVita server, electronically transmitting the resultant file to a third-party company for printing and distribution. Using this procedure, electronic versions of the letters were only temporarily stored on the EurizonVita server, and customer-requested copies could be regenerated by call center agents using another custom application.

In 2005, legislation was passed requiring life insurance companies to retain a copy of all letters sent to customers, and EurizonVita needed to quickly develop an archival system. Printing hard copies would not only significantly increase costs, but also bear tremendous environmental impact; an electronic storage system was the obvious choice.

While this could be accomplished by simply saving the Word file to the EurizonVita server prior to sending the letter for printing, the development team was apprehensive about the amount of storage space this would require. Another concern was that future software upgrades would render archived documents obsolete, due to the version-dependent nature of the format. Additionally, legislation stipulated that stored letters must be unalterable and meet specific security guidelines if stored electronically, to ensure the integrity of the copy, further ruling out the use of Microsoft Word due to limited file protection options. After considering these issues, the team at EurizonVita decided that a new file format should be used to minimize storage space, while retaining the original clarity. PDF was quickly identified as the best format for this project due to its high visual fidelity and security features, as well as the ubiquity of PDF viewers and the format's forward and backwards compatibility, which lessened the likelihood of archived documents becoming unreadable at a later date due to changes in technology and software packages. With a clear vision of what needed to be done, the EurizonVita development team began searching for a server-side product that could be integrated into the existing letter creation process to generate and store these important documents.

activePDF Solution

The EurizonVita developers evaluated a number of products and found them to be lacking the features required for this project. During stress tests, many programs demonstrated long processing times that resulted in application timeouts and instabilities, making them unsuitable for the high volumes of input that needed to be processed. Upon evaluating activePDF Server, the team knew they had found their solution. "Server is fast, efficient, stable, and robust," states Giorgio Moioli, Senior Analyst Developer for EurizonVita, citing Server's extensive features, as well as ease of use, as contributing factors in the decision to purchase. Within a month of obtaining Server, Moioli and the development team were able to implement a simple process for converting to PDF and archiving millions of documents.

In addition to meeting their technical requirements, EurizonVita developers were very focused on ensuring the new solution was transparent to their end users, with little or no change to day-to-day activities. EurizonVita agents still operate by selecting the type of letter from their custom program, at which point the corresponding template is populated using the information entered and output as a Word document. At this stage, the letter is sent for printing and activePDF Server is then used to convert the document to PDF, applying security restrictions set by the development team to adhere to the requirements outlined in the new legislation. Each PDF is given a sequential file name, for easy indexing and application reference, and then archived on the EurizonVita server. The call center agents can then access and extract the archived PDFs from their existing system in order to fulfill customer requests for copies.

Results

The archiving procedure using activePDF Server has allowed EurizonVita to quickly comply with new legal requirements, with virtually no change to the daily operations of its employees. Additionally, the shift to PDF has made it possible to email secured letter copies to customers in many cases, helping to reduce the company's paper use, decrease costs and the environmental impact while increasing customer satisfaction.

The PDF generation and archiving process has also had little impact on server bandwidth and the time required in submitting letters for mailing. "Producing a PDF from a Word file takes less than two seconds," comments Moioli, adding that, despite the high volume of documents created, the entire process is complete in just four seconds. "Server has been integrated perfectly into our applications," states Moioli, "I have used activePDF for almost three years and I am very pleased with the results we've achieved."