

SUCCESS STORY

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*- Kenneth Cox,
Senior
Programmer/
Analyst, Life
Insurance Division.*

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activePDF Tools Help Pacific Life Insurance Provide Custom Collateral at the Touch of a Button

Company: Pacific Life Insurance

Industry: Insurance

Product(s) Used: activePDF Server/WebGrabber/Toolkit

Company Overview

Pacific Life has a long history of service dating back to 1868. They provide life and health insurance products, individual annuities, group employee benefits and pension plans, as well as a large variety of investment products and services.

The Pacific Life family of companies manages more than \$335 billion in assets, making it one of the largest financial institutions in America, and currently counts 81 of the 100 largest U.S. companies as clients, according to the 2001 Fortune 500® list.

Business Challenge

If you have ever purchased life insurance, you may know that there are various types of life insurance products, the most common are known as Term Insurance and Permanent Insurance. Each category of life insurance is broken down into several sub-types. Your insurance representative must be knowledgeable and up-to-date on every product that is offered and be able to explain how the products fit your needs and specific situation.

Pacific Life provides many types of life insurance, and wanted an easy way for its dealers, brokers and producers to access current and relevant information. They decided that the best delivery method for secure content was an extranet site where representatives in any region could dynamically create reports with current data directly from Pacific Life.

“We wanted...to convert documents from native formats to PDF without having to spend a lot of money and time investing in a custom solution using reporting software,” says Kenneth Cox, Senior Programmer/Analyst for the Life Insurance Division. Pacific Life required a cost-effective reporting solution that leverages the existing skill-sets of its web-developers. They felt that a proprietary reporting tool was out of the question because it would take a lot of valuable time to learn, as well as deploy and maintain.

activePDF Solution

With activePDF software products, Pacific Life delivers the latest information, via a secure extranet, to all of its Life Insurance representatives. The solution was implemented by the internal IT department with relative ease.

With activePDF, they were able to use existing document formats, eliminating the need for custom code writing and the small file sizes allow users to connect to the extranet site at various speeds to download information.

If the documents are too large and time-consuming to download, the service will be underutilized, as well as creating a storage problem internally.

“Ultimately, we can be more responsive to changes using WebGrabber with standards based HTML reporting to produce reports. We have complete control over the layout...without learning anything new,” says Cox.

Why they chose activePDF

After evaluating other possible solutions, Pacific Life chose activePDF software because “the products are well documented and the features support all of our planned usage. technical support is available for all aspects of the software and the attractive licensing options allow us to make educated decisions to scale up or out,” says Cox.

Pacific Life plans to expand its activePDF solution in the near future. They are testing a plan to use activePDF Toolkit to merge secure encrypted PDFs on the fly. Representatives can then download a block of PDF forms, depending on their security level.

activePDF