INSURANCE

Industry Insider

opentext™

See how our partner OpenText tackles challenges in the insurance industry. From big-picture problems, to the specific needs of a customer service agent, OpenText has it covered.

OpenText helps insurance companies connect people, processes, and documents to gain an information advantage.

salesforce appexchange

Here's how OpenText helps insurance companies improve data and document management.

Accelerate operations and improve information flows.

Bring all your insurance documents together in one place to make it easier to work more efficiently. A single, smarter view of quotes, proposals, and claims helps all your teams – from sales to customer service – access the information they need, when they need it.

Improve document governance and controls.

Automate, govern, and streamline your customer information to improve security, reduce errors, and meet industry regulatory and compliance standards.

Delight prospects and customers with memorable experiences.

Deliver documents and personalized customer communications that build trust and brand loyalty. Promote and protect your company brand with consistent messaging throughout the onboarding, policy, servicing, and renewal processes.

Keep reading to learn how OpenText can help an insurance customer service agent streamline processes and create a more enjoyable experience for customers.

The Solution

OpenText streamlines document-intensive workflows with AI and automation, so you can capture, manage, and deliver documents and data together. This accelerates team productivity, improves customer experiences, and reduces risk by managing all mission-critical documents in a secure and connected way.

Boost productivity, streamline operations, and automate information flows.

The Challenge: Disjointed documents and manual data entry can lead to delays, missed opportunities, and poor customer and employee experiences.

The Solution: OpenText captures and integrates documents into Salesforce for a complete 360 view of customers, so you can see the whole picture and provide better service.

Securely manage information and documents to minimize risks.

The Challenge: A disconnected ECM system can cause document mismanagement and data leaks, which can cost insurers money and damage their reputation.

The Solution: OpenText helps insurers securely connect and share information with governance and user controls, external sharing, digital signatures, and integrations with popular applications.

One trusted, scalable document management solution.

The Challenge: Manual document intake is slow and error-prone. Different systems can't communicate with each other, creating silos that make it hard to move workflows forward.

The Solution: OpenText helps you connect all documents to Salesforce and across your entire business with a secure and scalable document solution.

Improve customer experiences at every step of their journey.

The Challenge: Inconsistent messaging, unscalable customer communications, and a lack of controls and approval steps can all hurt your sales and lead to frustration and disappointed customers.

The Solution: OpenText can automatically populate documents with Salesforce data to create personalized and error-free communications. Easy-to-edit templates support complex documents on a large scale, across customer channels.

The Scenario

In this example, let's imagine how an insurance customer service agent can use OpenText to help provide excellent customer experiences from onboarding to claims.

Casey Claims

Insurance Customer Service Agent

Casey helps new customers with policy questions and onboarding. She has to access a lot of information in different locations. To make onboarding and policy opening as smooth as possible, she's looking for a way to streamline the process.

Her Goals:

- Provide a seamless onboarding and policy opening experience
- Standardize preapproved letters of acceptance
- Get everyone on the same page with cross-departmental collaboration tools

Her Challenges:

- It's time-consuming to collect client onboarding documents
- It can be difficult to find critical information and respond promptly to customers when documents are stored in various places
- Without Salesforce integration, accuracy and error prevention are difficult

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OpenText solves Casey's challenges by helping her to:

Fuel collaboration across the business.
OpenText gives the right teams the right information at the right time so they can better serve their customers.

Protect sensitive customer information.
With secure access controls, Casey's company can make sure employees have access to the right information only when they need it. This security layer protects the company's important data and documents, as well as customer documents from data leaks or misuse.

Deliver personalized communications.
With OpenText, Casey can build long-lasting relationships with customers by creating trust, brand preference, and memorable experiences.

Connect all internal and external documents to Salesforce.
OpenText's comprehensive information management empowers Casey and her team to capture, manage, and deliver mission-critical documents for insurers to outperform their competition.

Learn more about OpenText