opentext™

Success story

Alberta Motor Association

Industry
• Multi-service, Insurance

Solutions
• OpenText™ Content Suite Platform
• OpenText™ Brava!™ for Content Suite
• OpenText™ Content Intelligence (OpenText™ WebReports)

Results

📅 **Same-day digital document** availability

$ **Cost and space** savings

🤝 Immediate, confident **customer service**

⚙️ **Efficiency** for increased workload

Alberta Motor Association re-paves document system for increased business traffic

CAA/AAA affiliate replaces outdated manual processes with enterprise content management from OpenText

"Historically, retrieving a document would take two weeks on average and occasionally up to three months. Compare that with today, where documents are available in real time and put to use within minutes."

David Panteluk
Manager of System Development
AMA

When AMA replaced slow-moving systems with OpenText up-to-the-minute, centralized document access, digital construction re-paved back-office operations leading to an increased flow of business traffic.

Desk-to-desk paper processes

For more than 50 years, the Alberta Motor Association (AMA)—affiliated with the Canadian Automobile Association (CAA) and its "Triple A" American counterpart—has provided auto, home, health and other insurance plans. Nearing one million people, close to one in every three households in Alberta, Canada, maintains membership with the AMA. To sustain and grow this coverage, AMA advocates for member interests at the industry and government levels and protects the things members care about most with insurance services.

Prior to implementing an electronic document management system, management of underwriting and claims was a laborious, paper-based process. Personnel at each AMA location were required to manually organize and box paper documents for delivery to large file rooms where dozens of staff members re-handled the vast array of documents, filing them in large cabinets.
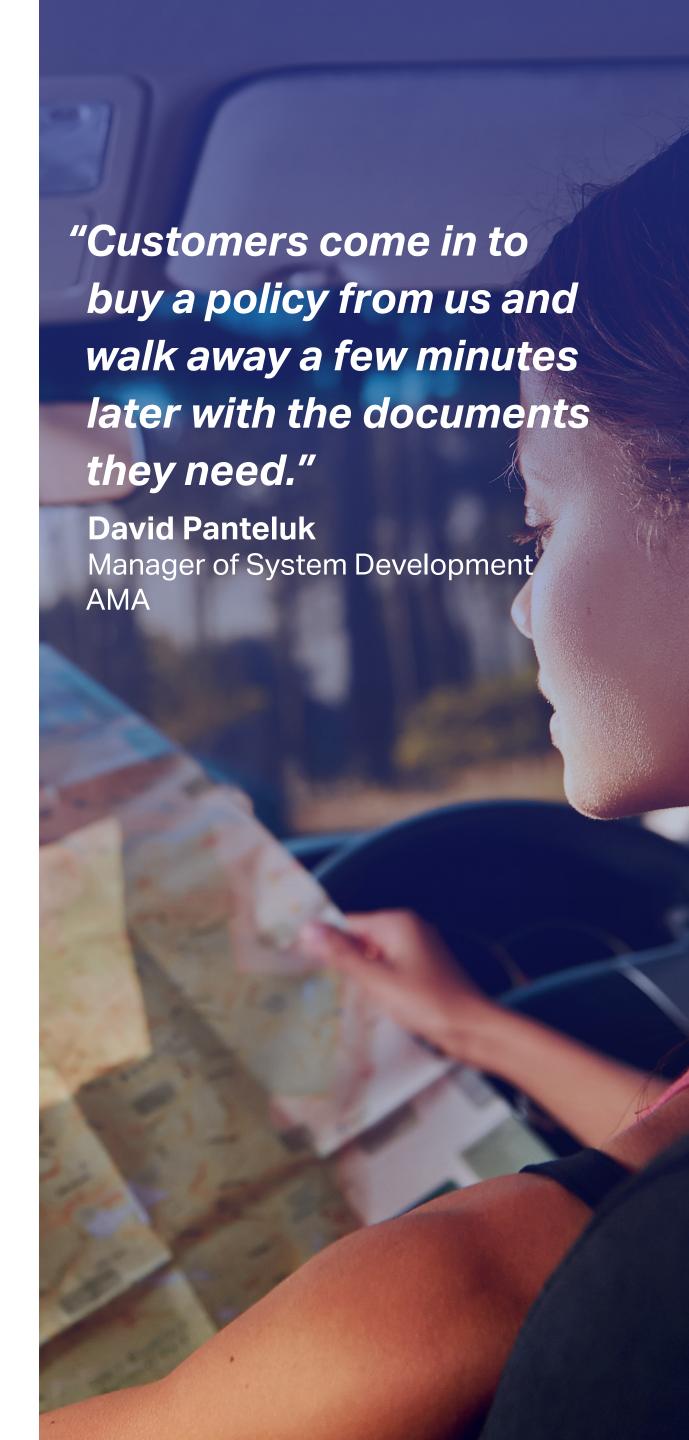
Even as document imaging was introduced, paper files were still routed desk-to-desk before being shipped to a central department for scanning. The process often caused paper loss or delays—as much as two weeks to two months—for policy origination, claims management and other tasks. Furthermore, a lack of integration between their in-house developed sales claims and underwriting system and legacy document management system, as well as complicated searching led to slow or duplicate efforts; staff members complained of time wasted tracking down documents, which affected the response time to customers.

Integrating content in the sales and claims management process

When its insurance sales and claims management legacy system reached end-of-life, AMA seized the opportunity to rebuild their processes and the technology used to support them. The provider built a new insurance production system and claims case management system and integrated it with OpenText™ Content Suite Platform, a comprehensive enterprise content management (ECM) system designed to manage the flow of information from capture through archiving and disposition.

Following a thorough investigative process, AMA's selection committee chose OpenText for its ease-of-use and straightforward integration. Now, AMA insurance professionals—from sales advisors and administrators to underwriters and claims advisors—access critical information at any time directly through a button within the insurance production and claims case management system labeled "Livelink," connecting to more than 16 million digital documents. When new files arrive from external sources in hard copy form, they are scanned, reviewed for quality and uploaded to Content Suite. AMA also added Content Suite workflow functionality so these transactions can be processed in the insurance production and claims case management system, then routed to the correct claims case management folder in Content Suite.

AMA professionals now easily share files or collaborate on operational tasks without the delays of moving the physical files from desk-to-desk. *"A claims advisor can review a file while somebody else in a different office can simultaneously access the same document, providing their permissions are set appropriately,"* noted David Panteluk, manager of system development with AMA. He described revised document management procedures at all stages of the insurance process:

> *"Customers come in to buy a policy from us and walk away a few minutes later with the documents they need."*
>
> **David Panteluk**
> Manager of System Development
> AMA

Sales—Frontline agents use the in-house system for point-of-sale transactions. Policy documents are created, then stored in and retrieved from Content Suite. *"Customers come in to buy a policy from us and walk away a few minutes later with the documents they need,"* Panteluk said.

Underwriting—Back office personnel use the system for underwriting insurance risk. They link directly from policy transactions to view supporting documents within Content Suite.

Claims management—Claim advisors use the system to confirm insurance coverage; to settle claims, appraisers upload files, such as photos and reports and advisors access all files through Content Suite.

As an add-on to Content Suite, AMA uses content-centric applications OpenText™ Brava!™ for Content Suite to ease collaboration and OpenText™ WebReports, to configure and automate real-time dashboards and integrated reporting. The provider plans to leverage other ECM capabilities from OpenText Content Suite, including records management and archiving.

Documents within minutes supports more business

By re-paving document back roads, AMA is increasing and expediting traffic flow on the sales and processing fronts. *"Historically, retrieving a document would take two weeks on average and occasionally up to three months. Compare that with today, where documents are available in real time and put to use within minutes,"* Panteluk said.

Efficiency translates into fewer personnel handling more demands in shorter timeframes—all enhancing service to members, AMA's constant focus. Results are apparent across the insurance operation:

Sales—An agent sells a policy, signed and supporting documents are scanned at the agency and entered into a workflow for verification. *"Within an hour or two, there is digital representation of all corresponding documentation in Content Suite, which is available across the organization,"* Panteluk noted. *"That's a big leap from where we used to be when it could take up to 90 days before those documents were processed and available."*

Underwriting—*"We don't have file clerks running to retrieve files and storing documents, but we've grown with the number of underwriters that we have,"* Panteluk said. *"So, we're able to do more business and to provide better support to our front-end advisors who are then helping our customers faster."*

Claims management—Due to tight integration between the claims case management system and Content Suite, the days of file requests and multi-day waiting periods are over. *"That's really helped our claims process,"* Panteluk noted. *"Maintaining hard copies of our claims documents was cumbersome and slow. Now we're moving forward with a much faster, slicker and more efficient solution."* In fact, at one time impossible with the previous document management system, AMA professionals collaborate on documents within minutes or, at least, the same day.
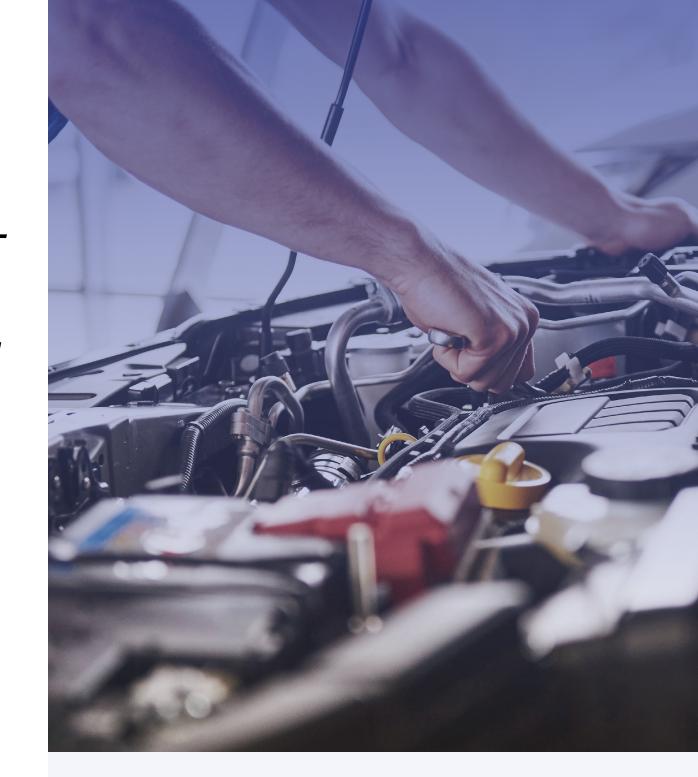
"Overall, we are improving our processes significantly," Panteluk said. *"Our agents confidently speak with members around our document retention and retrieval processes."* Such confident, immediate service is available across the enterprise—all offices, regardless of where policies are purchased, leverage the same document access to answer customer questions.

"We're able to do more business and to provide better support to our front-end advisors who are then helping our customers faster.

David Panteluk
Manager of System Development
AMA

AMA continues to observe cost-savings afforded by digital management. For instance, mailing costs are drastically reduced and the company re-purposed a 300-square-foot file room to office space for staff members, many of whom accepted paperless systems readily. *"We're hearing positive responses that show they trust OpenText Content Suite,"* Panteluk said. Wasted time and difficulty to locate files is gone and word is getting out: other AMA operating companies including Driver Education, Roadside Assistance and Membership want to upload documents to Content Suite as well.

The most important result for AMA is member benefits. *"With the integration between our production system and OpenText Content Suite, our employees don't have to work as hard on processes, they can focus on serving the customer,"* Panteluk said. *"We're creating value by being able to serve our members better."*

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

Customer stories ↗

opentext.com/contact

Twitter | LinkedIn