

APPLICATION OVERVIEW

OpenText Exstream for Insurance

Design and deliver individualized, omnichannel customer communications to enhance customer experience, speed time to market and drive operational efficiencies



Accelerate time to market for new products, services and offers



Optimize customer touchpoints across all channels for frictionless engagement



Reduce operational costs, streamline business processes



Meet regulatory compliance requirements

Insurance organizations face a variety of challenges. Conflicting regulations, such as GDPR, state and country, exert pressure to deliver compliant communications on a jurisdiction-by- jurisdiction basis. In addition, some customers still prefer contact agents and call centers for quotes, renewals and applications, while others want electronic applications, digital communications and web self-service documents.

OpenText™ Exstream™ for Insurance leverages existing customer data and content to transform typical policyholder communications into highly individualized, engaging customer experiences across all touchpoints to encourage customer loyalty. Whether it is reducing time to settlement, swiftly sending first notice of loss letters or reducing demand on IT resources by giving marketing teams the hands-on ability to create and edit communications, Exstream for Insurance can help.

Exstream customers include:

9 of the top 10 Fortune 500 life Insurers

7 of the top 10 Fortune 500 P&C Insurers

7 of the top 10 Fortune 500 health Insurers

59 DALBAR awards for outstanding customer communications

Grow

- Personalized offerings
- Segment marketing analytics
- Digital channels integration



Attract

- 1:1 promotions
- Agent quote-to-pay
- Policy issuance



Service

- Claims open-to-close
- Compliant-ready correspondence
- Invoice-to-pay



Acquire

- Account open/onboard
- Account self-service
- Case management



Design and deliver personalized customer communications for touchpoints throughout customer lifecycle.

Accelerate time to market for new products, services and offers

Insurance marketers that can ensure personalized and relevant communications for each recipient can quickly capitalize on trends, events and fleeting opportunities. Exstream for Insurance gives users direct, hands-on capabilities to create and launch rapid-response marketing campaigns and ongoing promotions, such as accelerated adoption of a new insurance product, a time-sensitive loan-rate offer or a new benefit tied to a higher account status. Marketers can prioritize campaigns and incorporate them into the available white space of important communications at runtime. Users can also link campaigns to automatically send follow-up messages based on previous response, lack of response, effective dates or a prioritization override, as well as track all campaign activity with a built-in knowledgebase that integrates with customer databases.

Optimize customer touchpoints across all channels for frictionless engagement

Customer communications are critical throughout the customer lifecycle and each is an opportunity to reinforce or broaden the client relationship. Exstream for Insurance leverages existing customer data from multiple sources and delivers it to digital and print channels to ensure messages and offers are personalized and relevant to that individual's profile and customer history. Statements are visually appealing, renewal letters simplify complex information using features, such as data-driven charts and graphs, and email and SMS notifications are delivered based on customer preference.

Reduce operational costs, streamline business processes

Most organizations have significant costs tied up in multiple customer communication technologies and processes that connect silos of information to customer communication applications. Exstream for Insurance is an end-to-end customer communication solution that helps marketing and business users make the most of every customer touchpoint.

This includes structured, high-volume bills and statements and automated fulfillment of on-demand, personalized policies, correspondence, quotes and proposals.

“In looking to upgrade our customer communications capability, the directive was to enhance customer experience and support business growth. OpenText Exstream delivered that result. It simply stood out in terms of features and the ability to satisfy what we were looking for.”

Glenn Moore
Head of Core Applications Delivery
nib

“Using OpenText, we’ve reduced the volume of forms by 28 percent, and based on business user experiences thus far, we expect annual savings of 70,000 business user hours once all of the centralized printing is complete.”

Marcus Knuth
Vice President for Enterprise
Technology Acuity

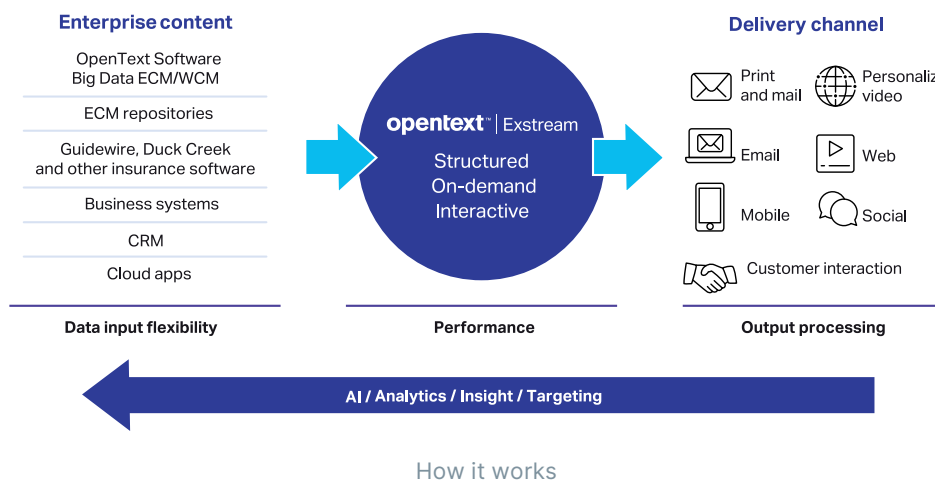
It creates targeted, relevant customer communications that drive action. Exstream for Insurance’s built-in approval workflow allows marketing and Line-of-Business users to remotely create variable messages that are integrated into documents, ensuring relevant

and current information is communicated in a timely manner. It also includes many capabilities for testing document applications, significantly improving productivity and optimizing performance.

Meet regulatory compliance requirements

Managing variable content to guarantee compliance with changing government regulations and privacy legislation is easy. The compliance support capability verifies that appropriate content is automatically included in customer documents based on effective dates and jurisdictions. Users can also generate all communications in the customer’s primary language to increase satisfaction and ensure compliance.

Exstream for Insurance is consistently ranked as a leader by industry analysts. It drives customer engagement and delivers personalized communications across customer preferred channels for consistent, remarkable experiences, both online and offline. This provides insurers with the ability to link dynamic engagements to all points in the customer journey through stronger marketing automation and digital delivery methods.



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Why OpenText Exstream?

- #1 CCM solution in market share and enterprise deployments
- Fastest production engine on the market
- Re-uses content across channels for true omnichannel communications
- Most integrations with leading business applications, such as ERPs (SAP, Oracle®, Infor), CRMs (Salesforce®) and deep content and data systems integrations with SAP Enterprise Portal, Guidewire™ and Duck Creek
- Strong enterprise customer references
- Large partner network
- Ingests data in any format, greatly reducing document processing time
- Part of the OpenText™ Experience Suite Platform, which includes solutions for DAM, WCM and more to provide a complete, 360-degree customer experience across all touchpoints

Easy integration with leading insurance solutions

Customers who deploy popular insurance software solutions, such as those from Duck Creek Technologies and Guidewire, can use Exstream for Insurance accelerators to promote better customer experiences with targeted, relevant and highly personalized communications. Automate the creation, assembly and delivery of time-sensitive communications for actionable customer responses using new digital channels.

OpenText Consulting Services, OpenText™ Managed Services and OpenText Learning Services support customers' digital transformations and optimize their investment in OpenText software and solutions. Passionate about customer experience, OpenText brings together the world's largest certified team of OpenText solution professionals to help customers build and execute on their digital strategy.

Consulting Services include:

- Professional Services
- Experience advisory services
- Implementation services
- On-premises, cloud and hybrid managed services
- User adoption services
- Training (classroom, virtual, certification)
- Success packages
- Integration services
- Modernization