

Ohio National Financial Services Advances Digital Strategy for Engaging Customers

Financial services company streamlines digital content creation; builds personalized, responsive customer experience with OpenText™ Experience Suite Platform and OpenText Professional Services

Though he has worked with the company since the 1990s, Christopher Spanier—now Second Vice President, Marketing Technology for Ohio National Financial Services—still remembers his introduction to the company’s focus on the customer. “I was really moved when an agent started to well up recalling his first time delivering a cheque from a life insurance policy: ‘They’ve just lost a dear member of their family, and there was nothing I could do to alleviate that pain, but I was able to alleviate some of the worry: they were going to stay in their home, the kids were going to college. Those worries, at least, were off the table.’ That really brought home how focused this industry and this company were on helping our customers.”

Founded in 1909, Ohio National provides life insurance, disability income insurance, annuities, and retirement plans to clients across the United States and in South and Central America. While the company experienced tremendous growth since 2000, it remains focused on building long-term relationships with clients.

Demonstrating Care in a Digital Environment

Whether they are connecting through a person or a screen, customers should feel supported, Spanier says. “Customer experience is hugely important and we’ve been doing it for more than a century. Now, the challenge is how to set it up so when someone comes to the website at a difficult time we make them feel comforted, knowing ‘we’re here for you.’ ”

In today’s connected yet diverse digital world, Spanier and his team point to availability and accessibility as critical touch points. “There’s a growing awareness that with customer experience it really does take place at any time, in any place, and in any form,” he says. “We can be available 24 hours a day – in person, on the phone, online, on a mobile device – and we need to think about how are we going to be there to respond.”

INDUSTRY

Financial Services

CUSTOMER

Ohio National Financial Services

CHALLENGES

- Navigating complex workflows for digital content
- Relating customer care across multiple platforms, mobile devices

SOLUTIONS

- OpenText™ Web Experience Management
- OpenText™ Portal
- OpenText Professional Services

BENEFITS

- Renovated portal and content solutions within five months
- Saving hundreds of hours annually with streamlined review process
- Establishing available and accessible customer care across all platforms

Increasingly, he says, meeting customers where they are involves connecting with a variety of mobile platforms. It is also acknowledging that the competition includes not only other financial carriers, but also online leaders in other industries who are vying for eyes and clicks.

Upgrading Digital Content Management

Ohio National sought to personalize online resources for its agents and partners following growth of a new distribution line in early 2000. After comparing several options, the company selected and installed Vignette Web Content Management, later acquired and developed as OpenText™ Web Experience Management. To handle complex workflow requirements, Ohio National customized several aspects of the system. In time, however, the changes hindered upgrades, eventually making the system unwieldy and unpopular. In late 2014, a cross-departmental team was formed to make a recommendation for a replacement product.

Ohio National assessed the situation and determined, “We’re going to look at this as if it were a new, fresh install – not how we’ve ‘Frankensteined’ this over the last 10 or 15 years,” Spanier says. At first, the company was not inclined to include OpenText, instead using the technology as a baseline.

The selection committee whittled a list of 40 companies down to six and then based on detailed RFP responses, the field narrowed to three organizations, still including OpenText. “We were appreciative of the teams from all of the companies that came in, but OpenText was great,” Spanier notes. “They just did a phenomenal job responding to our needs.”

Together, Ohio National and OpenText Professional Services transitioned the financial services company to OpenText Experience Suite as its content management and portal solution, helping the enduring company progress its digital strategy. Spanier reflects on the decision to stay with OpenText. “I’m glad that’s how it ended. We are in such a better place with significant potential to build and extend both internally and externally. This is the foundation that we’re going to continue to grow from.”

Enabling and Engaging Users

Digital strategy at Ohio National speaks to enabling the user, Spanier explains. The company now manages 11 core web sites with OpenText Web Experience Management and OpenText™ Portal, engaging millions of visitors per year. The sites, with more than 200,000 registered users, are directed towards specific groups, from financial professionals to policyholders or the general public. “It’s all about who you need to be for the audience when they come to you and Web Experience Management has really enabled us to do that,” he said.

With integrated technologies, OpenText Experience Suite supports personalized, responsive connections for Ohio National financial professionals and customers. Agents can easily check the status of a policy that is in underwriting or target clients that need attention. Using Portal, they can access documentation from an expanding library of nearly 40,000 content assets. Content is used and re-used while adhering to retention schedules and forming a reliable audit trail.

Policyholders view insurance and claim forms relevant to them since information is tailored and filtered based upon profiles. “It makes a connection with the user that we know a little about them,”

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Spanier notes. “Our biggest hits on the websites have always been those interactive pieces where OpenText gets you the information and gets you on your way.”

Ohio National now saves hundreds of hours every year previously spent reviewing and publishing content, according to Spanier. OpenText Experience Suite handles the complex workflows, returning a streamlined review process.

Finding the Right Mechanic

A strong partnership between Ohio National and OpenText led to a strong—and efficient—win. They implemented the integrated suite in five months, stayed within budget, and enabled end users to continue working with minimal disruption, according to Spanier. “The teamwork between Ohio National and OpenText Professional Services was outstanding and was a key component to the success of this effort,” he says. “This project was a powerful example of how OpenText Professional Services can supplement a company’s in-house team and, in working together, can meet some very aggressive goals.”

Going forward, Spanier compares his relationship with OpenText with that of finding a good car mechanic who always has the right tool for the job. “I think OpenText has come a long way to building out that tool bench for us,” he says. “If we have a need, I can talk to our account executive and nine times out of 10, they’re going to have a really good answer for us.”

Ohio National associates also notice the well-tuned machine as hundreds of associates use Web Experience Management to produce content and many stop Spanier in the hallway to share positive feedback. “That’s telling,” Spanier notes. “Most of the time, nobody goes out of their way to tell you they love how the engine is running. Web Experience Management is powering new features and functions for us and positioning us for the future. It’s been a great win for everybody.”

As a long-standing company, Ohio National understands the importance of customer experience for long-term relationships. OpenText solutions help the company engage with customers where they are and in ways that matter, building trust for the future.

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