



Success story

**FWD Life Insurance Company
(Bermuda) Limited**

Industry

- Insurance

Solution

- OpenText™ Customer Communications Management

Results



Streamlined transactional communications



Cost-effective personalisation exceeds customer expectations



Consistent voice across all channels and formats



Integrated fully with existing systems and processes



Creating quality customer relationships

OpenText Customer Communications Management strengthens relationships and improves efficiency at leading insurance company

"This has been a dream product. We save more than \$1.4 million per year. It helps us communicate more effectively and efficiently across different markets, languages, \$1.4 million national borders, and distribution channels. That represents a great investment for us."

George Wan

VP of Information Technology
FWD Life Insurance Company (Bermuda) LTD





Creating quality customer relationships

FWD is the insurance business arm of the private investment group, Pacific Century Group. It provides life insurance services in Hong Kong, Macau, Thailand and the Philippines. In Hong Kong, FWD offers general insurance, employee benefits and financial planning services. The company also has a brand presence in Indonesia.

FWD's overarching vision is to change the way people feel about insurance. To create this shift, FWD leverages technology to not only deliver innovative products, but also to focus on and enhance the customer experience.

Challenge

A primary front in the battle to fundamentally change the relationship between customers and the insurance industry—not to mention for driving additional business—is the customer-facing communications that are created and dispatched across the business. These communications, the data that feeds them, and the exchanges between all divisions of FWD and its customers are all critical aspects of the process that needed to be improved and made more efficient and cost-effective.

FWD sought out a leading edge solution that would enable them to print and manage all aspects of their customer communications—in multiple languages, through multiple interfaces and using inputs in multiple formats from various platforms. Cost and reliability were prime concerns, as was the capacity to handle high volumes and ease of operational flow. FWD also identified that they needed a solution that would support future expansion and the ability to tackle emerging user needs.

Solution

FWD launched an ambitious deployment project, working with OpenText to implement the OpenText™ Customer Communications Management solution across four locations within one year. The project kicked off in Indonesia in December 2013, continuing to Macau and the Philippines, and finally Hong Kong.

The result of the project was a complete, integrated, enterprise-class environment that encompasses all three elements of document management: composition, process automation and output.

The Customer Communications Management system takes data from FWD's existing business systems (without requiring any changes) and dynamically generates the communications needed to correspond with customers, partners, suppliers and employees.

One master template per document type generates all variations of language, personalisation, imagery, format (paper, electronic, mobile) and simplifies document development, production and maintenance, minimizing demand on IT resources.

Gone is the cumbersome, costly and time-consuming traditional method, where each application required separate business process definitions—from data collection to document distribution—that were duplicated for every document variation and each separate output format, across different divisions of the business.

"This product has been absolutely trouble-free and has delivered huge savings in both efficiency and paper cost as part of our digital insurance vision."

George Wan

VP of Information Technology
FWD Life Insurance Company
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Results

As well as creating efficiencies and reducing costs, OpenText Customer Communications Management is increasing FWD's scope to build new and deeper relationships of trust and confidence with their customers.

"This has been a dream product; it has been absolutely trouble-free and has delivered huge savings in both efficiency and paper cost as part of our digital insurance vision," said George Wan, VP of Information Technology at FWD Life Insurance Company (Bermuda) LTD. ***"We save almost \$1.4 million per year with OpenText Customer Communications Management. The solution has the distinguishing ability to evolve more at the same speed as our business. It helps us communicate more effectively and efficiently across different markets, languages, national borders and distribution channels. That represents a great investment for us."***

Now, FWD has a powerful tool to create more personalised and meaningful communications and speak to their customers with a consistent and responsive voice. With improved operational efficiency and direct control over content, business managers can react faster to market conditions and opportunities, with direct hands-on communications to increase loyalty and revenue.

OpenText Customer Communications Management works with FWD's existing systems and processes to extract the data it needs, preserving integrity and respecting rules of governance. It enables rapid deployment of dynamic, feature-rich, secure applications that would otherwise require hundreds of work hours to build. It is positioned to support FWD as their business grows in volume, channels, branches and systems—expanding into new languages and interfaces, all with minimal demand on valuable IT resources.



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](https://www.opentext.com).

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