

Thousands of forms, hundreds of thousands of customers and staff, countless workflows. One efficient solution.

CHALLENGE

This mega-insurer had a library of over 7,000 forms – and, just due to the nature of static paper forms, each one had the potential of error, incorrect submission and the need for re-keying and re-processing data.

Twin Technologies stepped in to help the insurer figure out how to convert their library of over 7,000 forms from static to dynamic. We knew through our technical expertise with Adobe LiveCycle that dynamic forms could address much of the challenge through data pre-population, data collection rules that prevent incorrect data entry, instant sharing of form info with other applications, digital signatures, 2D barcodes, security features and more. But we needed to go even further to make a profound change that would increase efficiency, save time and money, and cement customer relationships.

GOALS

Prioritize: With such a daunting number of forms in their library, we wanted to start where help was needed most immediately. The Forms Conversion Effort Estimation (FCEE) product was used to review and rate to see which were the most valuable and commonly used forms. **Adobe LiveCycle ES and eForms:** As we created the new dynamic forms, we also developed automated form packages, so only the appropriate and the most powerful forms would be delivered to the right person at the right time. The packages are entirely customizable, so individuals or organizations get the perfect mix of info and forms they need. Next, we made all of it available to sales reps and clients in any platform – mobile devices, web, you name it, all 100% dynamic. And, we made each form frustration-free, easy to use and immediately integrated into the insurer's data universe. **Best Practice Training Sessions:** High-quality e-Form implementation was introduced to business owners and IT staff.

OUTCOME

Huge processing cost savings gained through efficiency and automation, with more than double the time saved on processing errors. Just one example: a single change of beneficiary form used with nearly all new clients now saves the company over \$3 million annually. Overall, forms are processed much more quickly, and submissions of every form are easier, as they're built into the automated workflow. The company now has a solid audit trail history of claims, with instant access to the whole lifespan of each account, meaning better understanding and service for each client. Since implementing our system, the insurer sees new top-line growth and customer retention thanks to ease of use and the confidence of accurate communication.

WORLDWIDE
INSURANCE COMPANY

TECHNOLOGY

Adobe® LiveCycle™
Adobe® Flex™
java®
Microsoft® SQL

"We believe that our clients are looking to build a long standing relationship with an organization that pushes itself to understand the oncoming shifts in the marketplace and provide a path forward. True leadership is knowing how to implement within the constraints of today while embracing tomorrow."

BEN ELMORE
CEO & Senior Managing
Partner, Twin Technologies

INDUSTRY

 **FINANCIAL**

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