

## **ACUITY: CUSTOMER CORRESPONDENCE AUTOMATION**

Acuity implemented a CCM platform and forms portal to standardize and centralize correspondence across the enterprise. The 18-month project converted over 1,000 forms and has saved 1,250 business user and IT hours in 2017, along with a 65% reduction in forms maintenance resources.

### **Business Need**

Acuity, A Mutual Insurance Company, relied on over 1,000 MS-Word templates to support on-demand customer correspondence, which created version control and governance concerns. Use of non-CCM technologies, such as XICS and Microsoft Word, also created high IT maintenance costs and made it difficult to support multi-channel communication.

### **Project Team**

The project sponsor was the VP of Enterprise Technology. The team was made up of 20 internal IT staff (project managers, developers, and business units), as well as two members from the CCM vendor. The forms portal team included a project owner and manager, with about ten business and IT resources per sprint, along with nine technical resources from services partner ValueMomentum.

### **Phases and Timeline**

The project included the on-premises deployment of a CCM platform and the development of a browser-based forms portal. The CCM platform deployment was handled in three phases over 12 months. The portal was deployed in three phases over 20 months: creating a GUI, integrating the platform, and converting over 1,000 documents in ten sprints focused on single business units.

### **Tools and Technology**

The company used OpenText Exstream's CCM platform, including Empower and EWS running on the WebSphere application server. A Microsoft SQL server database is used to store data on the back end. The Exstream CCM platform provides integration flexibility with the company's applications and existing technologies.

### **Overcoming Challenges**

The company lacked the resources to convert 1,000 documents within a reasonable timeframe, so a services partner was used. This services partner was able to refine the company's specifications to work better with the platform and also trained company resources in different departments on effective forms creation using Empower.

### **Success Factors**

The company attributes the success of this project to the functionality of the CCM product, effective collaboration between business units, and focusing on user training.

### **Impact**

The project resulted in the savings of 1,250 business user and IT hours in 2017 and is projected to save 9,000 IT hours and 70,000 business user hours over several years. 28% of forms were rationalized, and forms maintenance resources were reduced by 65%. Business user satisfaction with the new system is also high.