

## SUCCESS STORY

# Insurance broker advances operations and expands to digital communications.

**INDUSTRY**  
Financial Services

**COMPANY**  
Insurance Broker  
Netherlands

The business provides services to over 21 affiliated partner companies in the north and east of the Netherlands.

The company offers insurance products from various insurers under its own name, and also runs an insurance business academy to mentor insurance professionals.

**OL® Connect** interacts with existing ERP systems to boost print operations and deliver multi-channel communications.

## Challenges

The insurance firm had an outdated ERP system that restricted their ability to produce modern digital communications. The business required a solution that would enable multi-channel output, flexible document design, and automation capability.

- Limited to print-only output
- Sending emails was only feasible by scanning and attaching printed documents
- Dated and rigid document layout
- Time-consuming and error-prone manual tasks to process physical documents
- High costs associated with postage and mailing expenses

## Solution

OL Connect significantly enhanced the company's ERP output without changes to the systems in place. OL Connect triggers various automated processes by capturing information from the ERP system.

- Users can now select print or email as output and deliver multi-channel communications
- Centrally manage print and email processes
- Design modern document templates
- Retain brand consistency for all customer-facing documents

## Results

- Optimized print operations and cut costs
- Improved the customer satisfaction by combining email attachments into multi-page documents and offering digital delivery options
- Reduced mailing and postage expenses with digital communications
- Eliminated manual processes and human error to enhance quality control and accuracy

## Document types

- Insurance policies
- Certificates
- Invoices
- Letters



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**Upland Objectif Lune** helps companies automate their business communications with our digital transformation solutions. We create, manage, distribute and automate transactional and promotional documents while solving the challenge of integrating systems.

