

opentext™

SUCCESS STORY

Corporate Synergies

Industry

- Insurance

Solution

- OpenText™ Fax2Mail™

Results



Improved employee productivity with greater efficiency



Faster customer response times for better service



Decreased costs related to automation and cloud-based efficiencies

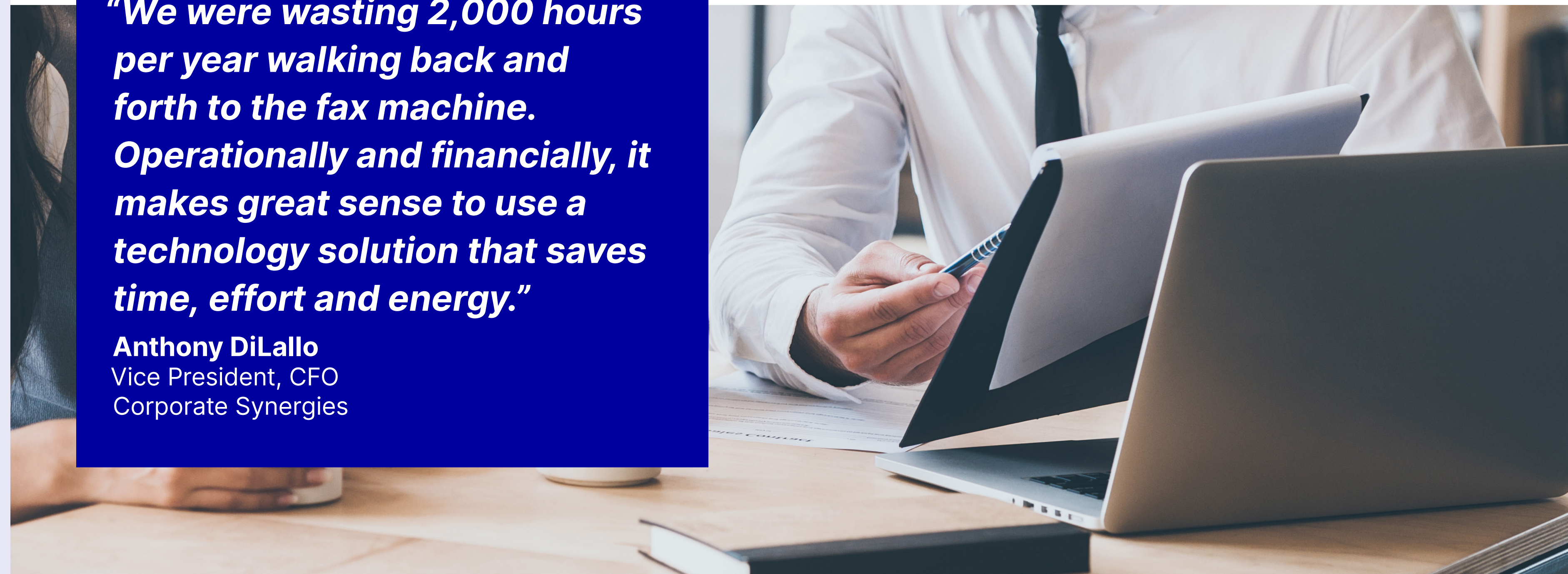
**CORPORATE
SYNERGIES®**

National insurance firm takes faxing to the cloud to increase productivity and lower costs

Corporate Synergies improves employee efficiency and customer service with cloud-based faxing solution, OpenText™ Fax2Mail™

“We were wasting 2,000 hours per year walking back and forth to the fax machine. Operationally and financially, it makes great sense to use a technology solution that saves time, effort and energy.”

Anthony DiLallo
Vice President, CFO
Corporate Synergies



Corporate Synergies is a national insurance and employee benefits brokerage and consultancy, supporting property and casualty insurance and health and welfare benefits clients around the globe. Headquartered in Mount Laurel, New Jersey, Corporate Synergies has provided one-stop insurance and risk mitigation consulting across a variety of industries since 2003. With more than 225 employees and 600 clients, the firm's priority is to deliver strategies that control costs, relieve administrative burdens and mitigate risk.

Background

Natural disasters, cyber-attacks or serious illness—Corporate Synergies is committed to helping businesses and their employees plan for and deal with these critical issues every day, as quickly and efficiently as possible. To meet this commitment, the firm's strategy is to achieve operational and financial efficiencies by leveraging advances in technology and pass these efficiencies to its clients. With that goal in mind, Corporate Synergies deployed the OpenText cloud fax solution, OpenText Fax2Mail, to improve employee productivity, enhance customer service and reduce costs.

Challenges

Paper-based faxing inefficient

With 600 clients who employ hundreds of thousands of workers, information exchange is a vital process at Corporate Synergies. Anthony DiLallo, Corporate Synergies Vice President and CFO, explains, ***"Our clients' employees call us when they need to get a healthcare claim processed, obtain a prescription medication or enroll a dependent in their healthcare plan,"*** he says. ***"Benefit plan participants are required to provide information, and while we offer***

many channels for them to communicate with us, such as email, phone and chat, there is a generation of people we serve who prefer faxing."

Occasionally, the insurance carrier, doctor and other players are not on the same page, or in some cases are miscommunicating with each other. ***"Our role is to get information from and to those individuals,"*** DiLallo says.

"We had fax machines in strategic locations in each of our offices to ensure client privacy. Using these machines was posing an efficiency issue, however. Our employees would be on the phone when a fax arrived. They would have to go to the machine to collect the document, return to the workstation, process the information and then return to the machine to send additional documents."

The company, which brokers employee benefits and property and casualty insurance, processes a great deal of information. ***"The use of fax machines decreased the efficiency and productivity of our employees,"*** DiLallo says.

Moving everything to the cloud

As a technology-driven brokerage firm, Corporate Synergies focuses on taking advantage of technological advances to help its employees do their jobs in a more productive manner, and thus provide better service to clients. Cloud technology figures prominently in DiLallo's plans for the company. ***"By the end of the next 24 months, I would like our company to function completely in the cloud, thus eliminating paper processing and operating as a completely 'green' organization."*** The first step: replace fax machines with cloud-based faxing technology.

"The OpenText Fax2Mail initiative has increased our productivity and efficiency immensely. The fact is our people can actually take their emails and documents and turn them into faxes and quickly send them right back to people. It's been a game changer as far as efficiencies are concerned."

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Solution

DiLallo and his team set about looking for a solution that would automate their traditional, paper-based fax processes and reviewed a number of marketplace options. **“We needed something that made sense operationally, but also made sense logistically,”** he says. **“The scenarios offered by various vendors were not working. Then OpenText showed us Fax2Mail, and it made perfect sense for our business and the direction we wanted to go.”**

Paperless, cloud-based faxing anywhere, anytime

Fax2Mail is an email-based faxing service that allows employees to send and receive faxes as electronic messages, directly within their email accounts. It eliminates the need for paper faxes, fax machines, fax servers and all related fax and telephony infrastructure, resources and costs.

Because Fax2Mail is fully hosted, the solution fit with DiLallo’s decision to move all of the firm’s technology to the cloud. Built on the power of the OpenText Cloud, Fax2Mail offers enterprise-grade security, automatic failover and built-in redundancy, data sovereignty and integration capabilities.

Benefits

Increased employee productivity and performance

With the Fax2Mail solution in place, employees at Corporate Synergies are now able to manage inbound and outbound faxing directly within their email accounts. DiLallo describes the new fax process. **“Now, a fax comes in directly to an employee and it pops up right on their screen,”** he says. **“The employee can read the fax, look into the client’s issue, resolve the problem and fax back documentation without ever leaving the desk.”**


A process that might have taken 15 or 20 minutes or even a half-hour in the past is handled within a few minutes.”

So committed was DiLallo to achieving efficiencies that he had even measured how much time staff spent walking back and forth to the fax machine. **“I actually walked the path to find out how many steps it took for someone to walk to and from the fax machine. In order to determine how much time was wasted during the course of the year on paper faxing,”** he says. **“I calculated how long it took to send a fax and how many times faxes were sent per day.”**

He estimates that the time saved by cloud-based faxing is equivalent to the annual hours worked by one full-time employee. **“We were wasting 2,000 hours per year walking back and forth to the fax machine,”** he says. **“Operationally and financially, it makes great sense to use a technology solution that saves time, effort and energy.”**

Quality of customer service improved

Whether helping a client get an employee access to medication for a sick child, settling a benefits claim or processing contracts, the new faxing solution has allowed employees at Corporate Synergies to respond more quickly to issues and resolve them in a more efficient manner. According to DiLallo, **“The OpenText Fax2Mail initiative has increased our productivity and efficiency immensely since the launch of the solution. The fact is our people can actually take their emails and documents and turn them into faxes and quickly send them right back to people. It’s been a game changer as far as efficiencies are concerned.”**



“We’ve been able to implement Fax2Mail without issues, and it’s working like a dream. Internally, from an IT perspective, it’s one of those things where it just runs and we don’t have to worry about it.”

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One group of Corporate Synergies employees that has benefited greatly from the solution is the firm's BenefitsVIP® employee advocacy and support center, an elite customer service team. ***"Our BenefitsVIP team members are on the phone all the time helping our clients' employees. If they are not on the phone, they are answering questions through voicemail, email or fax,"*** DiLallo says. ***"With the OpenText Fax2Mail solution, they have been able to respond that much quicker. We've received a lot of accolades from clients who say our BenefitsVIP service team is incredible."***

Cost savings in the cloud

By using the cloud-based faxing solution, Corporate Synergies has eliminated capital costs, software fees, telecom charges and ongoing maintenance, which aligns perfectly with DiLallo's plan to reduce overall costs. ***"In 2011, our overhead expense as a percentage of revenue was nearly 27 percent,"*** he says. ***"At the end of 2015, it was 16 percent. Looking at the last five years and then looking forward to the next five years, from a financial perspective OpenText fits in well with our operational efficiency goals."***

With no fax infrastructure to manage, the OpenText Cloud fax solution has been a smooth experience for the firm's IT team. ***"Quite literally, there are no issues or complaints with regard to the Fax2Mail solution,"*** DiLallo says. ***"We've been able to implement it without issues, and it's working like a dream. Internally, from an IT perspective, it's one of those things where it just runs and we don't have to worry about it."***

Conclusion

Next on the agenda, DiLallo and the team at Corporate Synergies plan to take an important step forward by integrating the fax solution with a new customer relationship management (CRM) system, slated for implementation this year. This integration will tie faxes to sales opportunities or cases within the CRM system. The fax machines of the past lacked any integration with the firm's business applications, further hindering process efficiency and performance. The new integration capability will be important for the company moving forward.

Reflecting on the success of the solution so far, DiLallo notes that he has been happy to share his experience with fellow executives who are struggling to find a cost-effective solution in an industry that remains reliant on faxing. ***"I basically tell them, 'OpenText solved it for us. It is a low cost but very efficient process. Faxes are emails. What can be easier than that?'"***



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.

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