

# Financial Services Insurance Giant

## Multi-Site Content and Personalization Infrastructure — A BEA/Documentum Solution

### The Organization

Serving millions of customers, this financial services giant is one of the largest insurance companies in the world. Its portfolio of investment products includes individual life, group and employee benefits, home, auto, and business insurance and reinsurance. With over 20,000 employees, the firm serves its customers through a sales and services channel comprised of more than 10,000 independent agencies and 100,000 registered brokers. With \$16 billion in revenues, this company has assets valued at over \$150 billion and enjoys a high ranking among financial services rating organizations.

### The Business Challenge

Insurance products are varied, complex and tailored to individual customer requirements. Therefore, employee knowledge and productivity, as well as quality customer service, are key success factors. To that end, this firm maintains three information portals: 1) an employee knowledge base, 2) a secure site for agents/brokers, and 3) a public Internet presence. Often, the same content needs to be applied to more than one of these portals, yet there are no common business processes or shared infrastructure to draw from. While audience-specific content delivery is an important objective, there are no functional mechanisms for the automated delivery of information according to business rules, user profiles, or preferences.

### The Burntsand Solution

Burntsand developed a unified content management and delivery infrastructure capable of supporting multiple portals. This includes standard business processes for the creation, aggregation, and personalized delivery of site and user-specific content. Taking full advantage of BEA's WebLogic and Personalization servers in concert with Documentum's content management platform, this solution reduces redundancy and cost, while boosting employee productivity and channel. Furthermore, it enforces disciplined processes throughout the content creation, publishing and retirement lifecycle.

## Project Background

Founded over a hundred years ago and serving millions of customers ranging from businesses to affinity groups and individual consumers, this insurance colossus is one of the largest financial services companies in the world. With over 20,000 employees, more than 10,000 independent agencies and in excess of 100,000 registered brokers, the firm's products mix and distribution channels are extremely diverse. The financial services industry is content intensive and highly regulated. Insurance products are varied yet generally must be tailored to individual customer requirements. Therefore, employee knowledge and productivity as well as quality customer service are key success factors. To that end, the firm maintains three online information portals, each targeting an important constituency within its demand chain: employees, channels, and customers.

Employees, channels, and customers:

- Employee Portal: A knowledge base, available to all company employees, but where access to specific information is a function of security and role-based privileges.
- Channel Portal: A secure extranet, available to all agent/brokers according to their reseller status.
- Public Site: The firm's Internet presence available to any user, but also containing secure and private information pertaining to existing customers with a valid user ID and password.

Motivated by competitive and time-to-market considerations, each of these sites was developed and deployed independently — at a different time, by a different organization, using different platforms and technologies. Each site generated benefits to its users and the firm as a whole. However, an increasing demand for access to online information and the need to facilitate growing content issues has raised important concerns across the entire content creation and delivery chain.

## A Content Matrix - Portals, Categories and Domains

Each portal is intended to improve customer service — indirectly, by improving employee and/or channel knowledge and productivity, or directly, by providing customers and customer-prospects with the easiest possible access to information relevant to their personal needs and interests. There are content overlaps between all three portals because the same information, or variants of the same information, is applicable to more than one site. In each case, some content is generated by the portal's own team. However, the majority of the content used for each portal is aggregated from category teams and domain centers elsewhere in the firm. This is particularly true for the employee and channel content sets.



## ABOUT BURNTSAND

Burntsand is a technology consulting firm specializing in integrating content, processes and data. For more than a decade, Burntsand has been a respected EMC Documentum partner with proven expertise in Enterprise Content Management. Leading organizations have trusted Burntsand to deliver results-oriented business solutions including document management and scanning, digital asset management, web and portal publishing, publications automation, and records retention. Burntsand delivers optimum time to value and unrivaled customer experience whether delivering an Enterprise Content Management Roadmap, complex integration or product installation. Our consultants work hard to ensure that accountability, leadership, teamwork and trust are the guiding principles of every engagement. With additional expertise in .NET development, Burntsand can help you create intelligent solutions that integrate seamlessly with your business.

Contact us at [ecm@burntsand.com](mailto:ecm@burntsand.com) or visit us on the web at [www.burntsand.com](http://www.burntsand.com).

**Boston**  
617.923.6500

**San Jose**  
408.879.7380

**Houston**  
713.267.2390

**Indianapolis**  
317.575.4104

**Calgary**  
403.213.8700

**Vancouver**  
604.608.6400

**Toronto**  
416.234.3800

Categories are complex groupings of products and services. Like portals, categories involve original content created by the category teams, as well as information sourced from elsewhere in the firm, such as domain centers. Domain centers are teams responsible for developing and maintaining specialized information pertaining to a particular subject area, such as a focused product or service. This information in turn is made available for use by other functions, including category teams.

Thus, the firm's three portals are driven by a hierarchical matrix of information groups comprised of "locally" created and "externally" acquired content. Yet, the portals and their feeder categories and domains have been operated and maintained without workflow and content management tools. As such, there were no meta data or tagging standards in place for the easy use and cost-efficient interchange of content objects between organizational entities - This limited functionality also makes it difficult, and therefore impractical, to implement personalized delivery of information to individual users.

A skyrocketing demand for online access to content, together with a lack of standard business and technical processes, means more labor must be applied to gather, work, organize, quality assure, deploy, and then refresh each portal. And from a user navigation standpoint, the increased volume of online information also adds great difficulty to this task.

## The Solution

Taking advantage of the combined power of the BEA WebLogic and Personalization servers in combination with Documentum's content management platform, Burntsand is building an infrastructure capable of supporting the authoring, aggregation, and application of content to portals and other sites companywide. A critical aspect of this effort is the formulation of a standard nomenclature and XML tagging schema for the easy sharing of content objects.

To simplify portal management and ensure scalability, individual departmental content management implementations are to be federated into a unified Documentum repository to support BEA's Personalization Server, which in turn will drive multiple portals via business logic and user identification. The BEA WebLogic application server platform also enables integration with other enterprise systems as required. Additional features include directory and email integration to enable single log-on to access multiple services and to facilitate workflows. The result is increased automation and centralized control to produce significant cost, productivity, timeliness, and quality of service advantages for users.

## Business Benefits

- Content description and tagging standards enable easy interchange and automation to reduce the cost and speed of publishing.
- Personalization enhances user productivity and navigation—even as content volume increases.
- Platform and technology standards provide scale economies simplify management and maintenance.

Federated repositories allow incremental build-outs and local organizational control at the portal, category, and domain levels among its disparate teams, departments, and groups.