



Xccelerate™ platform simplifies and streamlines document creation so documents get mailed faster

CHALLENGES

Frustrated with the inefficient workflow, poor quality of output, and delivery issues, a leading financial services company came to Universal Wilde for a new solution to create and distribute their annuity contracts and documentation.

This client's contracts were manually assembled by an internal team and an outside vendor. Because of the manual process, mistakes were made, and the contracts lacked a professional look and feel.

SOLUTION

Universal Wilde customized Xccelerate™, our state-of-the-art communications delivery platform and leveraged digital printing capabilities to meet the client's challenge.

Daily, a print-ready data file is imported into the Xccelerate system. This data file goes into the order management system and tracking on the order begins. The data is sent to the document creation engine where pre-determined business rules are used to populate the template and determine which paper stock is used to print the contract. The document is placed into a printing queue where it is held until it needs to be sent to the annuitant.

Throughout the entire process, the order is tracked in the order management system. The system administrator can log into the reports dashboard to see all the orders created, the date they were shipped, and other important order information.

RESULTS

- Reduced time to market from over 4 weeks to just 10 days
- All necessary documents are in one book and created with integrity and quality

This Fortune 500 Financial Services client is one of the largest investment management, mutual funds and online brokerage companies in the world. They service over 20 million individuals and institutions worldwide.



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