

## Allmerica Financial

### Personalization and data-driven graphics increase customer satisfaction



#### Business overview

Allmerica Financial is a leading provider of insurance products and financial services, managing more than \$14 billion in assets.

#### Challenges

Allmerica Financial produces a high volume of documents, including quarterly annuity reports for clients worldwide. The company uses strong graphical elements such as charts and graphs on its financial statements to illustrate complex financial concepts in composite snapshots.

Allmerica Financial wanted to expand its market and open new distribution channels for its reports and services. The company knew that to attract potential clients, its annuity statements and other documents needed to be easy to understand and offer value above and beyond what competitors in the financial marketplace offered.

The company also knew that research has proven that financial reports are easier to read and comprehend when they contain visual elements such as graphs. It wanted to move away from statements that contained only numbers with no illustrative examples, since those types of statements didn't offer as much benefit to the client. If it could add features like graphical summaries of financial performance and single graphs that chart multiple investments, Allmerica Financial believed it would be adding value to the documents.

An advanced software system was needed to manage and automate Allmerica Financial's production of presentation-quality financial statements. Because of the large number of documents being produced and the need to print from a variety of different printers, Allmerica Financial wanted a system with high-speed processing and multiple output capability. It also needed a system with the flexibility to customize statements with components tailored specifically to each client.

#### EMC solution

Allmerica Financial chose software from EMC to address its needs. The company conducted thorough research and assessed many software solutions before selecting the EMC® Document Sciences® solution for its advanced content automation, component management, and data-driven graphics capabilities.

The EMC Document Sciences solution features a powerful and flexible document composition engine capable of producing high-volume documents. It also features the ability to create, revise, manage, and assemble separate document components. In addition, the EMC Document Sciences solution enables all data, text, and graphical objects to be normalized and reused in future documents, eliminating redundant work and streamlining the production process. With standard document elements reused whenever possible, Allmerica Financial conserves manpower and money while maintaining quality.

The EMC Document Sciences solution has a convenient and simple user interface that automates even the most complicated graphical page layouts. Each annuity statement is personalized so that clients can see their allocation mix at a glance. The production speed of quarterly statements has been increased.

EMC Document Sciences offers the type of fully integrated content automation solution that Allmerica Financial requires for its fast-paced and constantly growing financial business. Documents can be viewed online, modified on the fly, and output to multiple formats, including paper, web, or CD-ROM, so that Allmerica Financial can distribute its financial statements in any media format.

According to Ted McGahie, Senior Consultant for Allmerica Financial, “Feedback from our customers on the new statements has been very positive.”

Tom Liro, Allmerica Financial’s Director of Administrative Services, agrees: “Clients see and understand their account information much more easily, and that reflects in a very positive way on Allmerica Financial.”

## Summary

The implementation of the EMC Document Sciences solution at Allmerica Financial has enabled the company to achieve all of its dynamic content publishing goals. By achieving these goals, several measurable return-on-investment benefits have improved Allmerica Financial’s bottom line, including:

- **Enhanced graphics capabilities**—Allmerica Financial can automatically illustrate even the most complex financial concepts clearly.
- **Reusable elements**—Graphics, text objects, and other data are now reusable enterprise-wide, saving time and money.
- **Faster production time**—With automatic formatting, batching, and printing of data, Allmerica Financial’s production is significantly faster.
- **Added value**—Significant additional value can be added to standard forms by customizing them to meet the specific needs of clients.

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Tom Liro, Director of Administrative Services, Allmerica Financial

## About EMC

EMC Corporation (NYSE: EMC) is the world’s leading developer and provider of information infrastructure technology and solutions that enable organizations of all sizes to transform the way they compete and create value from their information. Information about EMC’s products and services can be found at [www.EMC.com](http://www.EMC.com).



EMC Document Sciences  
5958 Priestly Drive  
Carlsbad, CA 92008  
USA  
+1.760.602.1400

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