

# Equitable Life revamps ECM

**W**aterloo, Ont.-based Equitable Life of Canada changed its enterprise document management system to better handle multilingual documents in its Quebec operations.

The insurance firm said its previous document management system, which has been in operation for the last seven years, was "very cumbersome" in handling French processing documents. The company expanded into Quebec for the first time ever last year and decided to make the switch to HP Co.'s Exstream product line to help facilitate the move.

Cam Crosbie, vice-president and chief information officer of Equitable Life of Canada, said processing time for documents in both English and French was the biggest factor in choosing HP. To make matters easier, he said the vendor of its previous system — which the company would not disclose — announced

it was entering end-of-life support just prior to the decision to enter the province.

"On the previous system, 25,000 documents would take us up to 24 hours to process," said Crosbie.

After narrowing down its vendor selection process to three companies, Crosbie said it held a "bake-off" over a three week period. Every week, a new vendor would come into the Equitable Life offices to test the processing time on 25,000 insurance statements.

HP's Exstream system generated the statements, which included policy holder contracts, statements and letters, in approximately 10 minutes, the company said. The average decrease in document processing time across the board, Equitable Life said, was about 500 per cent.

Mike Kaminski, an account manager with HP Exstream who worked closely on the Equitable Life project, said the fact that

the system was able to generate fast processing times regardless of the document language, helped his company win the contract. For organizations heading into their own enterprise document management upgrades, Crosbie advised IT shops to follow its "bake-off" approach and actually get vendors on-site to test your requirements.

"It adds a little bit more time to your selection process, but at the end of the day, you know exactly what you're getting," he said, adding that it is important to use identical machines in any comparison tests.

According to a recent Forrester report, EMC Corp., IBM Corp., Oracle Corp. and Open Text Corp. are the leading players in the ECM market. The report lists HP and Hyland Software as "strong performers" and "competitive alternatives" to EMC and IBM in document management.

—Rafael Ruffolo

business continuity and resiliency services unit. He said IBM recently polled more than 500 management level executives worldwide and discovered a huge gap between IT and the C-level suite regarding risk concerns. Saxton said "Eighty-five per cent of folks in IT are very concerned over risk," while that number only reaches 35 per cent when it comes to top business execs.

"That's a big disconnect in terms of gaining sponsorship," he said.

Other areas of concern for Saxton include organizations overestimating their risk management strategies when assessing themselves and the dominant tendency for organizations to implement reactive strategies as opposed to proactive plans.

For Singh, the key to overcoming this struggle to sell business opportunity to the "C-suite" is to bring in risk managers that can take "quantitative risk analysis" and repackage it into something business leaders understand. He said this means looking for candidates who not only have an understanding of IT risk concepts, but also superior communication skills.

"They need to always look at the business objectives that the organization won't meet if the risk comes to fruition," Singh added. This might also help IT leaders gain a couple "champions" among the business unit, which in turn, will help spread your risk strategy even faster.

Saxton agreed on the importance of spreading people across silos who can translate risk factors into easy-to-communicate business consequences.

"When you talk to the C-level, you have to communicate in small words, speak slowly and use lots of colourful pictures," he joked.

—Rafael Ruffolo

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