

Business Case



“Pleadings-to-go”; streamlining legal documents at GuideOne



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The US insurance company GuideOne has chosen to use the software of the Dutch company Invantive. “We were confronted with the need to automate the completion of our legal pleadings”, says Sam Waters, GuideOne’s Assistant Vice President.



Sam Waters: “We were spending too much time preparing standard documents and automation was the only solution. Our paralegals were spending 4 to 10 minutes preparing each standard pleading for attorney review. The majority of the standard pleadings contained 7 to 40 variables. The paralegals found

themselves typing the same variables over and over again. After comparing the costs of installing and configuring Invantive Composition with the costs of the least expensive employee, we found that the investment would pay itself back at least every three years.”

but it did not meet our requirements without manipulation of the document. Invantive Composition was just what we needed. Based on a Proof of Concept, it soon became clear that Invantive was able to help GuideOne achieve its goals.”

GuideOne Insurance

Headquartered in West Des Moines, Iowa (US):

- ✓ 770 employees
- ✓ 1800 agents
- ✓ 50 states licensed
- ✓ Yearly premium \$500 million

Litigation unit:

- ✓ 12 lawyers
- ✓ 1 case manager
- ✓ 6 support staff
- ✓ 600 templates
- ✓ 13 jurisdictions

Runs:

- ✓ Invantive Composition 2013R2 (Enterprise)
- ✓ Microsoft Word 2010
- ✓ IBM ECM for case management
- ✓ Microsoft SQL Server
- ✓ IBM DB2/UDB

More pleadings

“The law in the United States is ever evolving and changing; we expect the number of pleadings to increase and the law to become more complex. Using templates to create pleadings will allow the paralegals to prepare documents more easily, which means less time is needed for preparation. The Invantive Composition product takes legal cases from our case management system IBM ECM and creates a ready-to-review pleading, cutting our preparation time with 70%.”

No IT-skills required

“We were looking for a product that met two main requirements: the automation had to incorporate Microsoft Word and templates needed to be created by non-IT trained paralegals. We considered Oracle’s Documaker - a fine product -

Integrated into Word

“Invantive’s software met the criteria GuideOne was searching for, which included that the pleading had to be completed or prefilled in either Microsoft Word or Word Perfect format. The reason for that is that about a third of the pleadings that are prepared must be presented to a court for judicial review.

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Accordingly, the judge may make edits or changes before the

document is finalized. Invantive Composition met that requirement. We also wanted a product that could be modeled by the paralegals. Our IT department has increasing demands upon its resources and we knew they did not have the resources to model our legal templates. Because of that, we chose Invantive.”

Increased productivity

“We found that Invantive BV was particularly interested in making sure GuideOne was receiving value for its money spent. Invantive was receptive to additions which improved both the use of the product and the final outcome of the project. Invantive Composition wards off our need to add staff despite growth of the yearly premium. We expect that we will be able to add two more lawyers before we have to add corresponding supporting staff.”

Teamed together

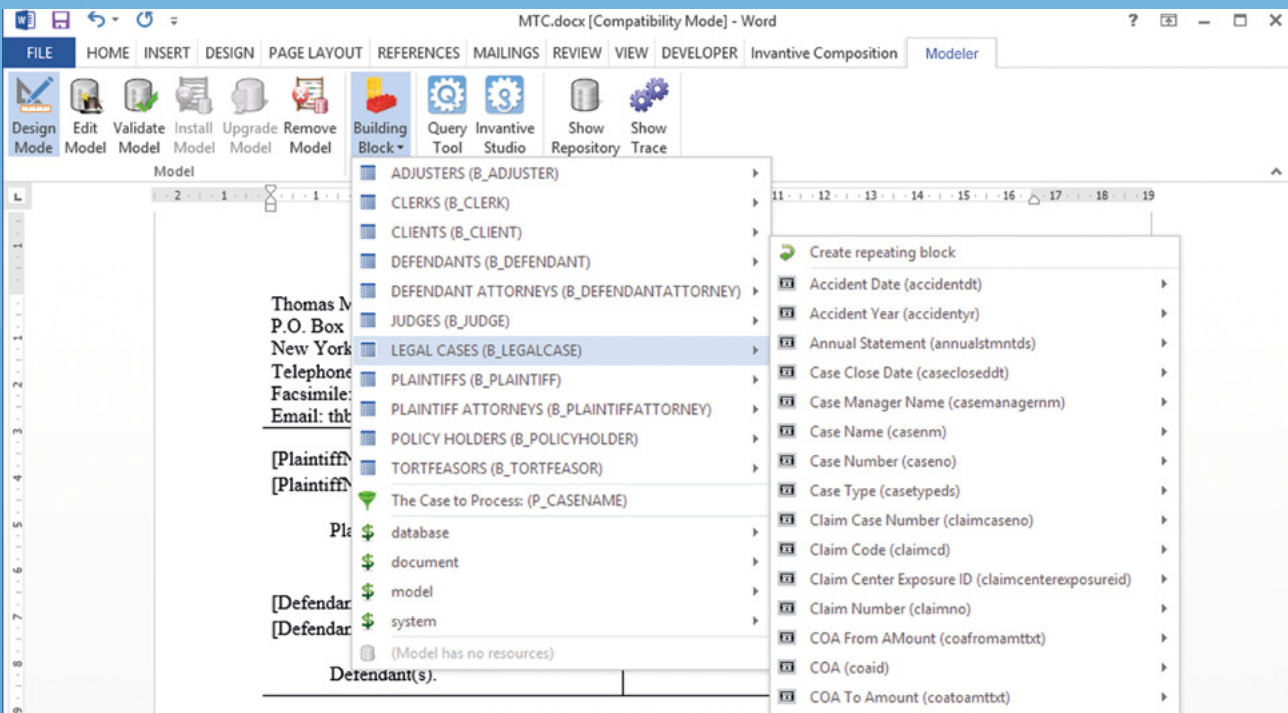
Guido Leenders, managing director of Invantive BV, says: “It is great to help GuideOne since their business

is both high volume and intellectually challenging. Together with GuideOne we have applied one of our innovative document solutions in a complex and ever changing business environment. Working together with GuideOne was pleasurable, since IT staff business users and Invantive employees all really teamed up for the successful implementation.”

About GuideOne

GuideOne is a premier niche market property and casualty insurer in the US. Since its inception in 1947, GuideOne Insurance has focused on creating superior and affordable coverage options for its niche customers: churches, schools (K-12) and higher education institutions (colleges, universities, seminaries), home care providers, living communities for the elderly and car and home owners. GuideOne is headquartered in West Des Moines, Iowa, and is one of the nation's largest church insurers, with about 43,000 church policy holders. GuideOne is licensed to do business in all 50 states. The company carries

an excellent rating from A.M. Best and was named a Top 50 Performing Insurer (out of 3,000 companies) for the past three years by the Ward Group. GuideOne is expecting its premium to grow to \$650 million by the end of 2015 (currently \$500 million) and with the anticipation of growth, the number of litigated files handled by the company is also expected to increase.



About Invantive

Invantive specializes in software solutions for companies acquiring and executing projects since 1992. We deliver software solutions for real estate, finance, banking, landscaping, technology and information technology industry.

Our experience in project and process management enables us to streamline and optimize repetitive processes. With Invantive as a partner you will have all the expertise you need to streamline your processes, reduce labor cost and create more business value.

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