



National Guardian Life

Providing fax peace of mind



Founded in 1909, National Guardian Life Insurance Company (NGL) is a mutual insurance company licensed in 49 states and the District of Columbia. NGL markets Preneed and final expense life insurance as well as group dental and vision coverage through independent agents. It is an active participant in merger and acquisition transactions to supplement its growth. NGL is rated "A-g (Excellent)" by A. M. Best, "A- (Excellent)" by TheStreet.com and "Api (Strong Financial Security)" by Standard & Poor's.

Highlights

- Conversion from GroupWise to Exchange
- Integration with OnBase imaging and workflow
- Fax server replacement
- Esker on Demand service for inbound faxes

Challenge

Fax is a core means of business communication for NGL. When the company underwent a major conversion from Novell to Microsoft technology, they also addressed struggles with its older fax server solution. "It was not an enterprise-capable solution for us," said Sam Linton, Technical Support Specialist at NGL. "We were trying to bend it in ways that really didn't work." NGL incorporates a wide range of documents into its Hyland Software OnBase imaging and workflow system for customer service in managing policies, claims and new applications.

NGL business units had long been looking to expand their ability to use fax beyond what they could do with the previous fax product. "We often work directly with smaller funeral homes that use fax machines, so we need to be able to do business that way," said Linton. NGL also wanted to give its agent force a route to send claim forms and applications from their offices, with support for increasing volumes.

Regulatory compliance is another key issue for NGL. "We're heavily regulated and becoming more so all the time, so we need to make sure everything in the back and forth with agents fits with the requirements for compliance, which are ever-changing," said Linton.

Solution

Consulting with CDW, NGL evaluated solutions from Esker and RightFax.

"Esker did a phenomenal presentation," said Linton. NGL chose Esker Fax as its fax server for outbound fax and an Esker on Demand service for inbound fax.

Benefits

With Esker, NGL has a stable solution to handle all faxing and get documents straight into its OnBase system. "We wanted solid technology with reliable support, and our experience with Esker has been very good," said Linton. "The product, the install, the technicians and the project management have all been very professional. And we don't have to monitor the system 24 hours a day, hoping it's still working, like we did before." Key benefits of the Esker solution for NGL include:

- Stability and flexibility to satisfy changing needs
- Visibility to see fax delivery status
- No busy signals for inbound faxing

Linton added, "Esker on Demand allows us to provide the agents the high level of service they expect to receive."

Future plans

According to Linton, NGL also appreciates the ability to migrate to Esker DeliveryWare for additional capabilities beyond fax. "It's nice to have that option, especially for integration with OnBase," he said.

National Guardian Life Insurance Company is not affiliated with The Guardian Life Insurance Company of America, a/k/a The Guardian or Guardian Life.

Ratings current as of 03/01/2009.

The stability and reliability of the Esker system is night and day over what we experienced before.

Sam Linton ▪ Technical Support Specialist ▪ NGL

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