



Hargreaves Lansdown

Online document management increases efficiency and improves customer service

Benefits

- Provides cost-efficient and effective management of information
- Enables instant on-screen retrieval of documents
- Complements existing client database

Business overview

Hargreaves Lansdown is a leading U.K. actuary company that calculates insurance and annuity premiums, reserves, and dividends for its clients.

Challenges

The actuarial process produces large volumes of data and correspondence that require storage. Each transaction involves gathering and recording client information and keeping details on a client's portfolio, together with copies of letters and e-mails sent and received.

Hargreaves Lansdown was faced with two major challenges—managing the vast and growing amount of client information, and storing this information for the life of each policy. To meet these challenges, Hargreaves Lansdown realized it needed to implement an effective document management strategy.

EMC solution

To manage the company's core information of client names, addresses, and products and information on portfolio management, Hargreaves Lansdown created its own system, called Spidermill, which operates with a Sybase database.

To support and complement Spidermill, Hargreaves Lansdown intensively researched document management systems. Based on its speed, cost-effectiveness, and advanced automated storage management, EMC[®] Documentum[®] ApplicationXtender[®] was selected. Sixty licenses were bought to support its 350 employees.

Summary

Now, the ApplicationXtender system makes it easy to manage a client's portfolio, which may consist of over 100 individual pieces of paper.

“Our customer service managers now have instant access to files, enabling us to provide an impressive level of service. We can answer inquiries immediately, instead of the ‘I’ll have to get the file and call you back’ answer we all hate to hear. Our ApplicationXtender system means our customers receive a much quicker response, and our users like the system.”

Cain Shelley, IT Manager, Hargreaves Lansdown 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.

Business profile

Hargreaves Lansdown

Leading U.K. actuary company

Industry

Financial services

Geographies

Based in Bristol, United Kingdom

Business solution

Document management, call center support/CRM, transactional content management

EMC products

EMC Documentum
ApplicationXtender

EMC partners

TDCI

EMC²

where information lives[®]

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Customer Profile
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