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Jim Bolton Manager,
Marketing & Communications,
Ebix, Inc.

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A leading international supplier of on-demand software and e-commerce services to the insurance industry, Ebix, Inc., (NASDAQ: EBIX) provides end to end solutions ranging from infrastructure exchanges, carrier systems, agency systems, and BPO services to custom software development for all entities involved in the insurance industry.

Customer Quote

“Our solutions are highly complex and there is a lot of documentation that has to be created and delivered to customers. In the past it was up to the customer to store all this documentation and ensure they had the most current version of any given document. Now, we use Enablement as an online library. Enablement’s biggest benefit is the sheer convenience of the solution. It’s easy for customers to use and download information from a single place. For us there is an enormous time savings as the platform’s auto-notification of new documentation eliminates the need to send multiple emails. Our clients get 24/7 access to all the information they need, and we have confidence in the knowledge that the right information is provided to them in a secure environment. As a company responsible for mission critical transaction support, Enablement goes a long way toward demonstrating our commitment to high quality service to our customers.”



Snapshot: Managing Customer Communications in the Post Sales Production Environment

Challenge	Solution	Results
<ul style="list-style-type: none"> • Needed a centralized location for large amounts of technical documentation and requirements 	<ul style="list-style-type: none"> • The Enablement Intelligence Center provides an easy-to-use update and search repository for any type of content 	<ul style="list-style-type: none"> • An online library with the critical documentation customers need
<ul style="list-style-type: none"> • Looking for an easy-to-update vehicle for sending information to customers including some of the largest financial services firms 	<ul style="list-style-type: none"> • Instead of email, Enablement Portals deliver customized and branded private websites that are accessible 24x7 	<ul style="list-style-type: none"> • Assurance that documentation has been delivered, received, and is easily accessible on an ongoing basis
<ul style="list-style-type: none"> • Needed to ensure that customers had the most current information in a timely manner 	<ul style="list-style-type: none"> • Enablement Portal Alerts notify customers when content is placed in their portal. Global updates allow changes to be made across multiple portals 	<ul style="list-style-type: none"> • Increased vendor responsiveness and deeper customer relationships result in increased customer satisfaction

“ We use Enablement internally as an online library and externally to deliver branded portals of relevant technical documentation to our customers in the production environment. It allows us to have an ongoing dialog and to easily give them current information on requirements and technical information.”

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Ebix, Inc: Increased Customer Satisfaction Through Customized Portals

1. What is your unique challenge?

Our solutions are complex so there is a lot of documentation that has to be created and delivered to our customers according to the schedules specified in our contract. We have everything from technical specs and requirements to training guides. We didn't have a central location for our customers to go for information. Instead we had to break content into multiple emails, not knowing whether they were received. From a customer perspective, they had to save and store documentation from multiple emails and they were never sure they had the most current documentation.

2. What solutions were you previously leveraging to address the problem?

We were using email to send large amounts of information. We used email for everything. In a way, we were being saddled by the process that our own solutions were trying to get rid of.

3. How are you using Enablement to address these challenges?

We use Enablement internally as an online library and externally to deliver branded portals of relevant technical documentation to our customers in the production environment. It allows us to have an ongoing dialog and to easily give them current information on requirements and technical information. Enablement makes it easy for our customers to locate and download information. Alerts notify them when new documentation is delivered to a portal and the solution allows us to have multiple portals for the same person if necessary.

4. In your experience, what are the most powerful features of Enablement?

Aside from the centralized location, the search capability is by far the most powerful feature. We have discussion groups that generate particular pieces of documentation and the names and titles can be difficult to find. But with Enablement multiple search parameters, you can narrow down your search or type in the description and easily find the documents you are looking for.



5. What has Enablement enabled your organization to do?

Enablement's biggest benefit is the sheer convenience of the solution. It's easy for customers to use and download information from a single place. Our customers love it and take full advantage of the flexibility and convenience. For us, there is an enormous time savings not having to send multiple emails, along with the confidence of knowing that our customers are receiving all the information they need. As a company responsible for mission critical transaction support, Enablement goes a long way toward demonstrating to our customers our commitment to high quality service.

About Enablement by CallidusCloud

Enablement is the industry's most advanced yet affordable hosted sales collaboration platform. For more information visit

<http://www.calliduscloud.com/products/enablement> or call (+1) 866 812 5244.

