

Catholic Life Insurance brings its profound sense of community online

Overview

■ **The Challenge**

The static HTML Web site of Catholic Life Insurance did not lend itself to community building, and employees lacked the ability to update the Web site dynamically

■ **Why IBM?**

IBM offers a cost-effective and flexible platform for building a dynamic and interactive Web site

■ **The Solution**

IBM® Lotus® Domino® Utility Server Express software

■ **Key Benefits**

- *New interactive Web site features offer customers a richer experience as well as more value and greater convenience*
- *New content management system allows Catholic Life to quickly update its Web site*
- *Improved site features and content management foster community building*



Catholic Life Insurance brokers insurance and retirement products that make a difference—literally. In fact, Catholic Life refers to it as the “fraternal difference,” because the Texas-based organization is 100 percent member-owned. And while sales of life insurance, individual retirement accounts and retirement annuities have propelled the organization to assets exceeding US\$600 million, the organization is just as proud to promote volunteering and community building. Today, the fraternal organization welcomes 70,000 members of all faiths who perform community services valued at US\$2.1 million annually—the worth of which extends far beyond monetary measurement.

So different is Catholic Life in the world of insurance and retirement product brokers that it credits community involvement as key to its enduring success. “We have a loyal clientele that can usually point to a parent or grandparent that was a member,” explains Barbara Cheaney, vice president of marketing communications. “When you buy a product from us, you become a member, and there are several additional member benefits that you gain. But more than that, our members contribute to the volunteer side of our organization—giving back to the small, rural communities where most of our members are based. We’re proud to be working towards building better communities.”

Key Components

Software

- IBM Lotus Domino Utility Server Express
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“Now our online presence matches our offline emphasis on community building. Our new site is a terrific way to engage members and share our fraternal difference.”

*—Tom Cortese
Vice President of Information Technology
Catholic Life Insurance*

Catholic Life builds a community-focused Web site

In order to foster interaction with its member community, Catholic Life made the decision to revamp its Web site. Instead of continuing with its static HTML site that was proving difficult to update and maintain, Catholic Life decided to implement a Web site that would feature interactive content. When it came time to build the new site, Catholic Life approached IBM Business Partner Titan Solutions Group. Since Catholic Life had a previous relationship with Titan, it was confident that the company could help turn the Web site into a vehicle for building community.

Ultimately, Catholic Life approached Titan because the fraternal organization saw a revamped Web site as a vital means to enhance its offline community building efforts. “We went with the Titan Solutions Group because we felt their knowledge of IBM products could help us build a Web site that would engage our members,” says Tom Cortese, vice president of information technology at Catholic Life. “As a fraternal organization, we like to treat our members like family. And we realized that the Web site could act as an important vehicle for relationship building.”

When it came time to pick a platform for the new Catholic Life Insurance Web site, Titan selected IBM Lotus Domino Utility Server Express. “Catholic Life wanted a Web site that would serve as a marketing tool to enhance their public image, and we thought Lotus Domino Utility Server Express was the right tool,” explains Jason Brice, senior software engineer at Titan Solutions Group. “When we met with Catholic Life, we developed a set of requirements around their needs—they basically wanted a very robust content management system that would leverage their existing platform. Since Catholic Life had good experience with older versions of Lotus Domino, we decided the company should upgrade to the latest and greatest version in order to take full advantage of the development tools that come with it.”

IBM Lotus Domino Utility Server Express offers an interactive Web presence

In order to help foster community, Brice set about using Lotus Domino Utility Server Express as a platform to build a better Web site for Catholic Life. “The old site was merely static HTML,” he explains. “That presented a number of problems because if you changed something on one Web page, it tended to break the other pages. We wanted to build them a consistent Web site with consistent menus, headers and breadcrumb trails.”

As a result, the staff at Catholic life decided to build a Web site with greater interactivity and more timely content. “In order for our site to offer more than just static content, we needed to revamp the way people access information and the way we add and edit content,” explains Cortese. “Plus, we wanted to add new features and functionality that could help our members more easily find information and resources.”

In addition to building a more consistent Web site, Lotus Domino Utility Server Express promised to deliver improved functionality. “Catholic Life wanted search functionality,” Brice continues. “And search functionality is basically built into Lotus Domino Utility Server Express. As a developer, you don’t even have to think about it because it is in there—but to Catholic Life, it seemed like magic because they basically had search functionality overnight.”

Catholic Life also wanted feature-rich tools to improve the customer experience. Once again, Lotus Domino Utility Server Express delivered. “From the customer side, we improved the site features in a number of ways,” Brice explains. “We built a ‘find an agent’ tool that allows customers to enter their zip code to find a local sales agent. We added a mailing list sign-up feature and change of address capabilities. And we developed a financial calculator that helps customers evaluate their retirement savings.”

Lotus Domino Utility Server Express delivers dynamic content management

In addition to improving customer functionality, Catholic Life Insurance also wanted content management tools that would allow them to update the Web site without requiring technical expertise. “Catholic Life wanted their marketing staff to be able to manage the content for the Web site dynamically,” Brice explains. “For instance, every Fourth of July, Catholic Life hosts a big barbecue for its fraternal members, and the company hoped to share pictures from the party as soon as they were available. The staff needed to be able to update the Web site without having any knowledge of the HTML or JavaScript™ languages.”

The content management feature allows more people to post and edit content and it helps preserve limited IT resources. “The content management system allows non-technical people to publish and edit materials to the site without the need for assistance from our IT staff,” explains Cortese. “That is crucial because we have limited IT resources. Plus, the staff at Catholic Life can edit a wider variety of content, including multiple types of editorial materials and images.”

Ultimately, Lotus Domino Utility Server Express was able to deliver the content management functionality that Catholic Life desired. “Rather than have a separate package like Macromedia Dreamweaver software, where employees would have to jump into the HTML coding, Catholic Life now has something that looks like a word processor, allowing employees to create content and make it look the way they want. Then Lotus Domino Utility Server Express translates that content into HTML,” Brice explains. “Making changes to the old site was onerous because they had to track down one of the two people at Catholic Life that knew HTML, but now employees can make immediate changes to the site without having to worry about coding.”

“One of the things I really like about IBM Lotus Domino Utility Server Express is that it is a very good platform for rapid prototyping. If you are gathering requirements and you want to give a customer a sense of what something might look like, nothing really rivals Lotus Domino Express.”

*—Jason Brice
Senior Software Engineer
Titan Solutions Group*



Lotus Domino Utility Server Express automates content approval workflow

In addition to permitting dynamic updates to the Web site, Lotus Domino Utility Server Express automates the workflow around the update process. "We built an approval cycle using Lotus Domino Utility Server Express," explains Brice. "Lotus Domino Utility Server Express lends itself to workflow automation, and Catholic Life wanted to have supervisors review content before it went live. A lower level person can now update content such as a press release and save it as a draft. Then a supervisor can approve it before it goes out to the live site."

Lotus Domino Utility Server Express offers easy development

While Catholic Life appreciates the new functionality it enjoys with Lotus Domino Utility Server Express, Brice values the ease of development made possible by the platform. "One of the things I really like about Lotus Domino Utility Server Express is that it is a very good platform for rapid prototyping," he explains. If you are gathering requirements and you want to give a customer a sense of what something might look like, nothing really rivals Lotus Domino Utility Server Express. There is no other tool that allows you to go as quickly from concept to code. As far as prototyping goes, Lotus Domino Utility Server Express is a dream for developers."

Lotus Domino Utility Server Express provides a new venue for community building

Brice believes that the new Catholic Life Insurance Web site will go a long way towards building the community that helps Catholic Life attract new business. "Now they have a much richer site," he explains. "They have a photo gallery with pictures from their events, and other features that contribute to the site's community feel. After all, how many insurance companies that you know of have a Fourth of July barbecue that people actually show up to? Now they can take that sense of community and put it on the Web. Hopefully that will allow them to drive more traffic to the site and garner more business."

All told, the staff at Catholic Life couldn't be happier with their revamped Web site. "Now our online presence matches our offline emphasis on community building," explains Cortese. Our new site is a terrific way to engage members and share our fraternal difference."

For more information

For more information on IBM Lotus offerings, please contact your IBM sales representative or IBM Business Partner, or visit: ibm.com/software/lotus

You can get even more out of Lotus software by participating in independently run Lotus User Groups around the world. Learn about opportunities near you at: lotususergroup.org

For more information about Catholic Life Insurance, visit: catholiclifeinsurance.com

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