



# Beneva (Formerly SSQ Insurance)

## Client Success Story

### Beneva Streamlines Document Processes from Dynamics 365

Beneva is a mutualist company that puts community at the heart of insurance. With assets under management of \$11 billion, Beneva is one of the largest companies in the industry. Leader in group insurance, the company also has expertise in individual life and health insurance, general insurance and the investment sector.

#### Challenge

Since they have opened doors in the 1940s, Beneva has consistently grown by promoting a community-centric philosophy and service innovation. One of the latest evolutions was changing the way the company created customer-facing documents like contracts and letters.

Until last year, Beneva managed these critical customer communications with manually dependent systems based on Microsoft Excel worksheets and Access databases. Besides the inherent inefficiency of the process and a propensity for errors, customer information used to create the personalized documents brought security issues as employees transferred data between different systems. To improve operational efficiencies and compliance, accelerate communications, and ultimately drive customer loyalty, the document generation solution needed an update.

When the team at Beneva undertook to make the change, they set an aggressive schedule for themselves; they intended to migrate to a modern, flexible and scalable solution within eight months. Experlogix Document Automation stood out as the provider who would help them achieve their goal.

#### PARTNER

Experlogix

#### PRODUCTS

Experlogix Document Automation and Microsoft Dynamics 365

#### BENEFITS

- Improved document consistency
- Accelerated schedule
- Infinitely scalable and reliable

#### COUNTRY

Canada



## Solution

### Ready to Go Right Out-of-the-Box

Beneva wanted their CRM platform, Microsoft Dynamics 365, to drive the new document generation system. This approach would simplify and streamline the document creation and delivery processes, and eliminate manual steps. Experlogix Document Automation features built-in, robust connections to Dynamics 365, with a user-friendly interface and powerful capabilities for template creation, management and delivery; it was just what the company needed to meet their requirements and conversion deadlines. The migration could proceed without heavy IT support.

The Experlogix Document Automation software installation and conversion from the legacy document system was quick and smooth, as the product already included most of the functionality Beneva required. Customization was only necessary to build a connection between Experlogix and Beneva's document archival system. Capabilities such as multilingual support and omni-channel delivery were handled routinely. Experlogix's fully featured solution for Dynamics 365 was ready to go practically "off-the-shelf".

Once the Experlogix team trained Beneva employees to create templates, they operated the system nearly autonomously. In the first three months following the conversion to Experlogix, they created over 3,000 documents without any errors or issues.

### Out with the Old

Under the legacy document system, users had to download documents and modify them manually. The risks of lost documents, messy data, mistakes, and lack of standardization were high. Under the new, automated Experlogix Document Automation solution, manual intervention and the exposure to human error that accompanies it, has nearly disappeared. Though users still have the option to modify Experlogix-generated Microsoft Word documents, Analyst Nicolas Rame says it is rarely necessary: "In the first three months using Experlogix Document Automation, users only intervened three times."

Another drawback of the old Access database system was a limit on the number of concurrent users; Access was unexpectedly crashing when deployed in multi-user environments. The Experlogix Document Automation solution for Dynamics 365 eliminates this limitation as well as the issues of lost productivity associated with database interruptions, supporting any number of users an organization could need to add.

Beneva prints and mails to customers their CRM-driven documents. The demographics of their clientele make print the most appropriate output channel for these communications. However, as consumers are turning more and more to mobile technologies, Beneva has identified an opportunity to drive customer engagement and started investigating future alternative approaches such as email delivery and electronic signature. Experlogix Document Automation software already includes features supporting omni-channel output and e-signatures, so the document generation system will be ready to meet these requirements.



## Result

Besides minimal customization, the Experlogix Document Automation solution for Dynamics 365 was delivered to Beneva with most of the functionality they needed. Practically “out-of-the-box”, the software installation and conversion from the legacy document system went extremely well and on schedule, meeting the aggressive eight-month timeline the company had set. Beneva employees were immediately comfortable operating the new solution and creating highly personalized, compliant documents on their own, via automated processes. Though support is available, they have had little need to reach out for technical help or professional services. Easy-to-use software, process automation, and thorough pre-installation training diminished the need for post-implementation support, boosting productivity.

Additionally, the Experlogix Document Automation solution eliminated the user number limitation and associated database interruptions. Infinitely scalable and reliable, the modern document generation software can support any number of users without causing efficiency issues, to support Beneva’s future growth. It also includes omni-channel delivery options such as email, mobile, and SMS as well as electronic signature; when the company evolves yet again, the system will be ready to add these capabilities to their customer communication strategy and enable them to engage in more meaningful ways with their demographics for durable relationships.

The conditions Beneva experienced are not unusual. Many organizations operate multiple legacy systems for creating and distributing internal and external documents. They have fashioned solutions with tools available at the time, but these methods cannot keep up with today’s demands. Data security, document compliance, and personalized communications are all important aspects that impact a company’s relationship with their customers. Improved internal efficiencies that ensure timely, accurate response are as equally important. Software like Experlogix Document Automation allows organizations to modernize and streamline their document generation processes, while driving customer loyalty, without requiring huge investments in both time and customization.



“We pleased our users. Now they create customized, variable data documents on demand with one click.”

**Nicolas Rame**  
Analyst



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