CONDOR: ELECTRONIC MAILBOX REDUCES THROUGHPUT TIMES

In 2008 the Condor insurance group, today part of R+V Allgemeine Versicherung AG, started converting to electronic files and the corresponding mailbox solution - resulting in major changes in procedures for incoming mail as well as in the individual departments. Today Condor's customers and brokers profit from more flexible and considerably faster transaction processing and competent responses to inquiries to the service center.

THE CHALLENGE

As an insurance broker, the Condor insurance group relies on fast, reliable processing of transactions and particularly good information about procedures over various end customers and fields. In 2009 the decision was made to introduce electronic transaction processing – with a very tight budget.

THE SOLUTION

Together with macros Reply, Condor used the ePOS project for the digitalization of incoming mail to introduce a workflow-optimizing mailbox solution and an IBM Filenet P8 filing system. The department-encompassing harmonization and simplification of document types as well as special training support the categorization of the classic incoming mail into a modern document service for scanning, indexing, distributing and archiving.

THE USER

With the incremental, efficient introduction of the mailbox/file system for electronic processing, Condor employees always have an overview of the inbox, procedures and processing status. The service center in particular profits from a 360° view of the customer with a clearly improved ability to access information.
The first push for electronic files was almost by chance: *"Our rooms and halls were full with secure storage for paper files. The fire department's criticism of the narrow*

© Reply
www.reply.eu

emergency exit paths led to the start of digitalization," Wilfried Henkel said about paper-based transaction processing. In 2008 Condor first restricted itself to the introduction of 'late archiving' to manage the amount of paper in the halls. In the scope of the "electra" (electronic archiving) project, the files were first digitalized after processing and a portion of the old files were copied to microfilm. This project was mainly driven by the IT department but already reached its limits in 2009.

The background was, on the one hand, the takeover of Condor by the R+V Allgemein Versicherung AG in 2008 and their high standards in transaction processing. On the other hand, the responsible parties recognized that late archiving alone would not sufficiently exploit the potential of electronic files. The mailbox continued to be managed in paper form and was manually distributed internally. An additional hindrance: The original elektra archiving did not follow workflow or transaction processing aspects, but was only based on files. The result was a time-wasting search for documents and processes on the part of the employee. The final shot was fired by the original system when the supplier went bankrupt and the maintenance as well as development was no longer assured.

MACROS REPLY AS A NEW PARTNER

"The follow-up project was increasingly driven by the departments and the organization and had to consider the special requirements of broker insurance – Condor is sold exclusively by brokers and must provide these agents with particularly good and efficient services. In the selection of a partner,, macros Reply was convincing as the industry-leaving supplier in the field of mailbox / file systems," reported Wilfried Henkel about the start of electronic transaction processing.

The joint team was quickly convinced that, contrary to the previous approach of late archiving, the support of macros reply could be harnessed to realize inbox digitalization and an electronic mailbox. The objective: To use the entire potential efficiency of electronic transaction processing for Condor. An initial pilot of the ePOS system was developed and started in the Condor automobile division. The reason for this decision: The automobile division was a young, innovative department and was also located externally.

TIGHT BUDGET CONSTRAINTS REQUIRED EFFICIENT, INCREMENTAL INTRUDUCTION

For budget reasons as well, they worked with the team from macros Reply to develop an incremental plan to introduce the system. To be able to quickly implement the digitalization for the mailbox team without a lot of additional training, a time-consuming pre-indexing of the documents was not applied at first, for example. Instead of sorting into many fine document categories, a few global document types were defined. The distribution rules were also configured in a streamlined fashion. In a first step, only a few group mailboxes were introduced. The detailed distribution at the transaction processing level was done in the departments.

This is where the strength of the macros Reply solution becomes apparent: The mailbox/filing system policies can be configured flexibly and, after the incremental introduction, can still be adapted and improved.

"The mail distribution is clearly accelerated by the digitalization. At all work stations and especially in the service center access to the digital files and, therefore, faster information access was possible", is how Wilfried Henkel described this first phase. *"At the same time we became familiar with and learned to appreciate the advantages of optimizing workflows, for example the site independence of transaction processing departments.*

INTEGRATED FILENET STORAGE SYSTEM

In the scope of the project, macros Reply also introduced IBM Filenet P8 as an audit-proof storage system. For improved attributions and monitoring of the access from the mailbox, the Filenet project team used flexible macros to integrate eBridge connectors into the transaction processing. This integration provided Condor with more flexibility for their own workflows: *"In this way the audit-proof archiving of outgoing mail can either be started directly during transaction processing or as late archiving by the document service by scanning in shipping*," said Wilfried Henkel in describing a few advantages of this integration.

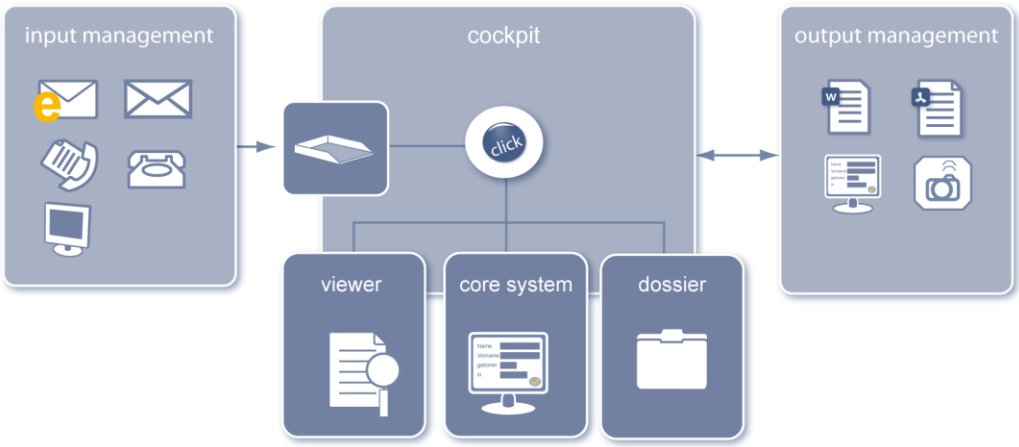
INTERDEPARTMENTAL STREAMLINING OF THE DOCUMENT TYPES

The pilot project in the automobile division also showed that the departments involved and the manual indexing in the inbox required harmonization and simplification of the types of documents. *"It may sound trivial, but what we call a policy is called an insurance certificate in the property/casualty business. If we want to make the search easier for cross-department support, we would have to simplify the chaos in the document types in name as well*," said Wilfried Henkel about the agreement between the divisions that was, so a degree, difficult.

After the document types were reduced by basing them on processes, the next step was to design the interface of the ePOS system according to the requirements of the departments. This integration into the project optimized and individualized not only the various user interfaces but at the same time helped increase the acceptance of the new system.

TRAINING: THE INBOX IS CERTIFIED FOR DOCUMENT SERVICE

At the same time, the employees in the mail center were trained for their new duties as a document service provider. For various types of documents, sample text passages and key words were defined to improve the hit ratio in manual indexing. Here we also followed the concept of incremental detailing: After the "simplified" distribution by document service, the individual departments will be able to index incoming documents in a more detailed manner for their work.



To include the employees from the various departments as well as document service in the changes, the insurance company invested heavily in training and information. The document service team was trained for several positions in franking, digitalization, late archiving, etc. The in-depth training in several tasks made it easier to understand the complete process and enables the personnel to be used in a much more flexible and needs-based manner. *"Thanks to intensive training we were able to move the teams from simple mail entry duties to working in a modern, electronic document service. This is of central importance for the success of the project, after all the quality of the distribution has a major effect on the efficiency of the complete electronic transaction processing,"* Wilfried Henkel explained there were also changes in the other departments. For example, in transaction processing departments, larger screens were purchased so that several windows and documents can be opened and seen at the same time – this was also to increase the acceptance of the new system and the departure from paper files.

CLEAR IMPROVEMENTS

For Wilfried Henkel's team, the advantages of the new mailbox/file system were clear. *"This particularly concerns the ability to provide information to brokers and customers. The work in the service center profited considerably from the 360° view of the customer. The employees always have an overview of the mailbox, procedures and processing status and can therefore provide information on the status of inquires from all insurance branches more reliably and faster,"* said Wilfried Henkel in summarizing the main successes. For client there is no doubt: *"The insurance expertise of the macro team in combination with the configurable standard products with a high degree of pre-finishing is simply the difference from the other suppliers and has completely convinced us."* The expectations for the system were entirely fulfilled. With the support of macros Reply, additional improvements should be possible in the future. In this way competencies and tasks can be bundled efficiently at the individual locations – after all, the physical location is secondary in the digital ePOS workflow. A long-term consideration within the organization: Additional potential for efficiency can be realized with automation and a certain degree of dark processing. The investment in the previous solution and the established workflows remain protected: The policies within the macros Reply solution can be adapted correspondingly.

macros Reply uses innovative software to optimize its customers business processes. Company-wide information and document management systems, archive solutions, process monitoring and mailbox / file systems from macros Reply have convinced numerous well-known customers. The macros employees have high degree of technical competence as well as industry and process-specific knowledge, which is reflected in every product. This is also the company's most important unique selling point. In conjunction with the configured standard products and expansion modules, macros offers its customers exactly the solution that reflects the individual business processes. Instead of wasting time with the search, distribution or the processing of information, macros helps mailbox and file customers process their work, from the inbox to the outbox, or research and coordinate their information across the organization with the DMS intranet – and always purely browser based. After all, macros Reply, which was founded in Munich 1999 and represented in Hamburg with a branch office, is one of the pioneers of the Internet. The inclusion in the network of the European-wide IT service provider Reply opens up access to the knowledge of over 3,000 IT experts to macros Reply. In 2010, the Reply network of companies had a turnover of approx. 384 million euros in the main offices in Italy, Germany and the United Kingdom. For further information, visit www.macrosReply.com.

Macros Reply GmbH
www.reply.de