

# HELVETIA AUSTRIA: MORE PRODUCTIVE THROUGH DIGITIZATION – THE CUSTOMER IS PLEASED

The Austrian company Helvetia Versicherungen AG has extensively digitized its case processing. Whether by post, fax or e-mail – the upstream post scanning, electronic files and mailboxes enable identical processing regardless of media. The conversion based on the Macros eWorkplace software took place within two years. The special procedure used by Helvetia for tendering and implementation can be seen as an example to be followed.



***“During the presentation of the concept based on the Macros eWorkplace given by the Macros Reply team, we were offered not only a viewer for digitized/archived documents but also a complete workflow-supporting mailbox and e-file solution with distribution guidelines. Moreover, the team impressed us during the presentation by its technical expertise and project experience in the insurance industry.”***

*Gerald Schlesinger, Project Manager, Helvetia Versicherungen AG, Austria*

## THE CUSTOMER

Helvetia Versicherungen AG operates in all branches of life insurance and casualty insurance. With about 850 employees, Helvetia serves about 500,000 customers in Austria. It is a part of the successful Helvetia Group, active across Europe and headquartered in St. Gallen, Switzerland. Helvetia has a long-standing tradition of providing its customers with individualised solutions. The company was founded in 1858 under the name “Der Anker”, and is the oldest insurance company in Austria. The general directorate is located on Hohen Markt, one of the oldest and most historic plazas in the centre of Vienna. The Ankeruhr (Anchor Clock), Vienna’s most famous decorative clock, adorns the headquarters of Helvetia Austria. The Art Nouveau clock was commissioned by the previous ANKER insurance company more than 100 years ago in order to symbolise the ephemeral nature of time. Corresponding to the actual nature of insurance, the musical figurine clock is said to bring attention to making timely provisions. In August 2014, Helvetia took over Basler Versicherungs AG in Austria, and increased its volume by more than 50%. The volume of insurance premiums for Helvetia in Austria exceeded the EUR 400,000 mark for the first time this year thanks to a good business trend as well as the takeover. As a result, Helvetia became one of the top 10 insurance companies in Austria. Today Helvetia Group has subsidiaries in Switzerland, Germany, Austria, Spain, Italy and France, and manages parts of its investment and financing activities through subsidiary and fund management companies in Luxemburg and Jersey.

## UNUSUAL TENDER SETTING GOALS IN THE FOREGROUND

### GOAL: INCREASE PRODUCTIVITY, ADD MULTICHANNEL CAPABILITY, NO MORE STACKS OF PAPER FOR PROCESSING CASES

For many years, Helvetia Versicherungen AG has been saving the case processes in its Life and Property/Casualty divisions by means of a digital FileNet archive. For this purpose, all documents were digitized once the processing was completed. However, the processing itself was primarily done on the basis of inquiries and documents made available by customers and partners. A Lotus Notes application developed especially for Helvetia supports the processing and communication. “Despite the increasing of e-mails and electronic communication with customers and partners, our goal was to become more productive and to make the piles of paperwork disappear from the desks in the case processing area. When processing the files, it should make no difference to the customer how the inquiries and documents reach us,” says Gerald Schlesinger, project manager at Helvetia, describing the initial situation at Helvetia.

The tender for the VESUV (complete input scanning and processing) project started in March 2013 in an unusual manner. “As a provider, we generally receive tenders that include very exact guidelines, some as specifications with feature lists and exact guidelines for the implementation. Helvetia’s approach was quite different and significantly more open. Along with the other service providers, we received a kind of Executive Summary in which “only” the goals to be met by the project were formulated,” reports Gabriele G6rgen, project manager at Macros Reply, about her first contact with the project.

Some of the project goals included digitization of the paper mail, process standardisation for all contact channels, mail archiving, saving time in the archiving/indexing process, regulation-based and automatic mail distribution and monitoring options for processing. The way this would be accomplished was left open. On the basis of the suggestions received, Gerald Schlesinger and his team reduced the provider list to a short list of three providers.

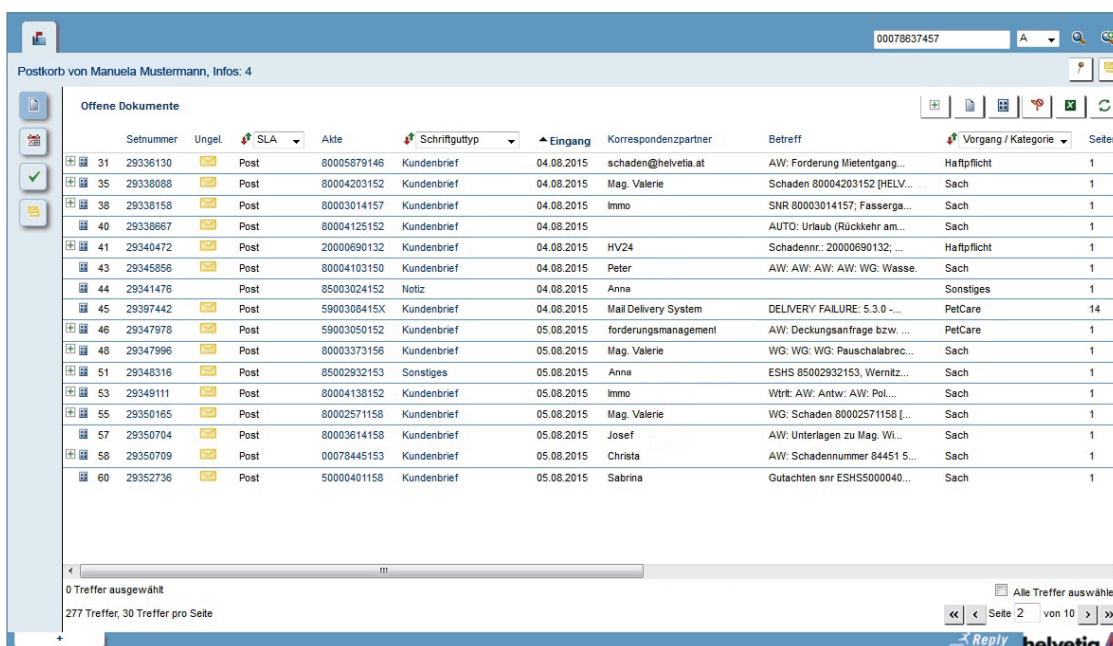


Figure: Electronic mailbox

## TRUSTING IS GOOD, MONITORING IS BETTER PROOF OF CONCEPT

The favoured concept was ultimately presented by the Macros Reply team on the basis of Macros eWorkplace standard software, which has a flexible configuration. “We were offered not only a viewer for the digitized/

archived documents, but also a complete workflow-supporting mailbox/e-file solution with distribution guidelines. Moreover, the team impressed us during the presentation by its technical expertise and project experience in the insurance industry,” said Gerald Schlesinger.

However, in the final phase of the tender Helvetia made an order for a proof of concept but not for the whole project. For this purpose, the Macros Reply specialists were to set up an executable standard configuration of their software on the IT systems of the insurance company in order to show its options, clearly illustrate processes and test the functionality of the interfaces. “We intentionally operated and paid for this proof of concept as an independent project. We did not want to outsmart the provider with at-no-charge additional services, but instead learn more about the details and gain certainty for the project. I am convinced that every cent for this phase has paid off,” said Gerald Schlesinger, looking back at the beginning of the cooperation. If the proof of concept phase did not meet expectations, the project would have been cancelled, or another provider would have been commissioned.

But everything ran very well, both technically and professionally, and the test installation met expectations. The system installed for the proof of concept was able to be used directly as the development system. Only now a detailed specifications manual was created and coordinated to prepare for implementation. An additional benefit of the trial installation was that Helvetia employees were able to get an impression of how it would be to work with the system. This was important because many of the processes to be supported in Macros eWorkplace were previously mapped in the company’s proprietary Lotus Notes

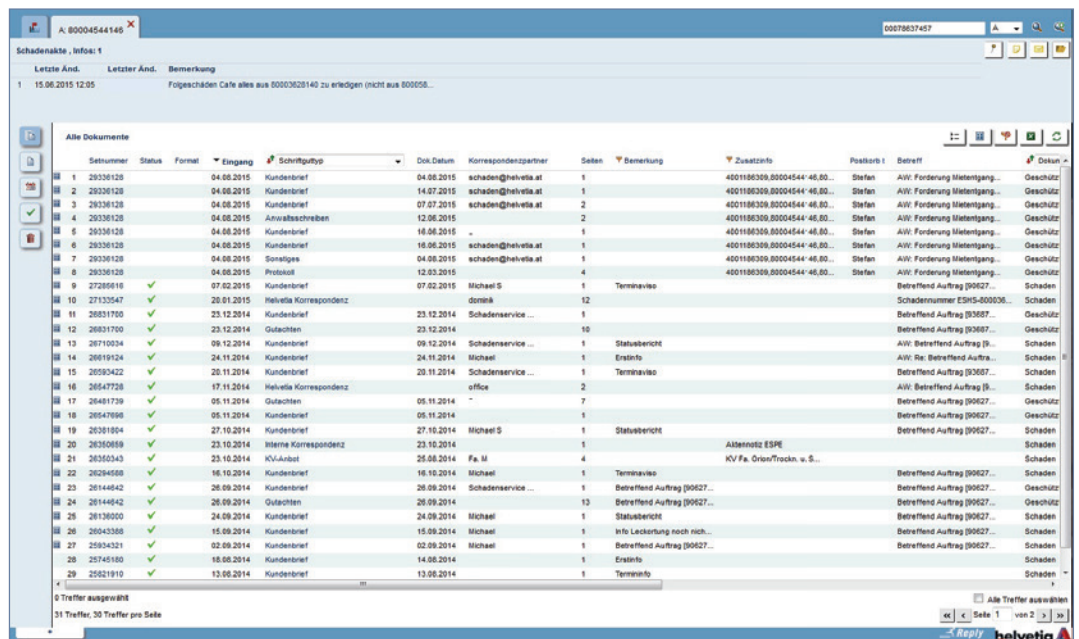


Figure: Electronic file

application. This was indeed positive because the employees were already familiar with a workflow-oriented IT solution. On the other hand, these experiences also raised the expectations for the future solution to a high level. One of the consequences was that the technical departments first insisted on the 1-to-1-taking-over of the already known distribution guidelines for the team and individual mailboxes. This changed after a few weeks of working with Macros eWorkplace, and the technical departments used the new opportunities to further optimise the distribution.

There were also conversions in the IT technology. The upstream digitization and indexing via a service provider changed the transmission path to the archive and the databases. An additional special feature: the Macros application is operated and supported by the IT team for Helvetia in Vienna, but the servers with the software are located at the Helvetia Group in Basel, Switzerland.

## LESSONS LEARNED

In September 2014, the Casualty division went live. Since March 2015, the employees in all divisions have worked with VESUV and the existing system on two large screens. The scanning service provider handles the digitization and indexing of incoming mail. Distribution to the mailboxes is done automatically and in a rule-based manner. The result: the piles of paper have disappeared from the desks and the processes run independent of the channel or medium over which a customer inquiry is entered. The technical departments were able to concentrate fully on their value-adding activities that previously fell by the wayside because of the necessary but time-intensive generation of instructions for the downstream digitization. Optimisations are currently running. They are to increase server performance, and improve the integration of Mozilla Firefox as the browser.

“For us, the goal-oriented yet open inquiry and the proof of concept as a separate project have proven their worth. Both may be unusual, but these processes provided us with maximum certainty and allowed us to rely on a configurable standard

software instead of individual programming with all of its risks in development and future adaptations,” says Gerald Schlesinger, summarising his project experiences. Changing scanning service providers shows that this process was not made pro forma. Helvetia changed to Swiss Post Solutions in the course of the tender and the project.

For Macros Reply as well, the selected process has shown to be an effective and ideal “Best Practice Approach”. “The company goals were always at the forefront throughout the project. With our configurable eWorkplace software, we could show early on whether and how the client’s ideas could be realized – professionally, technically, and in terms of time and costs. A true proof of concept on the systems creates the desired certainty for customers and service providers,” says Gabriele Görden of Macros Reply.



As a specialist for document management systems within the Reply Group, Macros Reply uses innovative software to optimise its customers’ business processes. Company-wide information and document management systems, archive solutions, process monitoring and mailbox / file systems from Macros Reply have won over numerous renowned customers.

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