BARMENIA: A SUCCESS – ARCHIVE MIGRATED, eFILE AND INBOX ESTABLISHED

A key component for the Barmenia insurance group's success is a modern IT infrastructure to support and secure processing steps. The existing archive system had reached its limits and, after initial pilot tests with early archiving, they wanted to leverage the benefits of the modern eFile and iNbox solution for the entire group and across divisions. Barmenia initiated a multi-year IT project with Macros Reply. The archive with more than 10 million documents was migrated to EMC Centera from jukeboxes. The partners implemented a uniform eFile and iNbox solution that integrates all relevant functions for the workflow organisation into the processing steps up to the move into the department inventory systems. Today, the IT solutions developed with Macros Reply form the information technology backbone for processing in the Barmenia insurance group. Together with Macros Reply, efficient, highly flexible, and thus future-proof electronic transaction processing has been established in the company to make processing significantly more transparent, more efficient and faster.

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"To successfully manage such complex IT projects requires strong soft skills from the product providers, service providers and internal employees as well as good intuition. In Macros Reply, we found the equal partner we were looking for. We were presented with solutions that were convincing both from their technical and IT point of view – and a practical concept for the migration of the old archive system," André Engelmann, head of e-services, Barmenia Versicherungs-Gruppe.

THE CUSTOMER

Barmenia is one of the major, independent insurance groups in Germany. Around 3,300 employees in back office and sales support a portfolio of nearly 2 million insurance policies. The essential pillars of Barmenia are the Barmenia Krankenversicherung a. G., the Barmenia Lebensversicherung a. G. and the Barmenia Allgemeine Versicherungs-AG with their products in the fields of property, liability, accident and automobile insurance. Barmenia divisions such as general insurance, health insurance and life insurance enjoy great popularity among customers. This has been proven by numerous awards such as "Most popular insurance company", "Best private health insurance" and "Test winner in service" in the area of private health insurance.

EARLY ENTRY INTO ELECTRONIC ARCHIVING

To differentiate themselves from the competition in terms of quality, speed and reliability, the Barmenia insurance group has traditionally opted for modern, high-performance IT solutions. It was back in the 1990's that the insurance company introduced the late electronic archiving downstream of processing. In the form of BOAS (Barmenia optical archive system), the company was one of the first to establish their own IT system with WORM media (write-once-ready-many). This system was later replaced by the archive system IBM FileNet. "At the turn of the millennium, the company decided to take advantage of the electronic file for early archiving in transaction processing as well. First pilot and department solutions were based on SmartFix as a scanning solution, a separate post box host solution for distribution and the FileNet archive as a backend," recalls Björn Schmitz, who today is the team leader in the area of "Input management" at the Barmenia insurance group. Rapid technological progress, new service providers constantly appearing on the market and the need for increased integration and workflow orientation in the systems led to the realisation: in the long term, proprietary, closed archive systems have no future. The risks for insurance companies in usage and application are large and difficult to control. "For example, if the producers experience economic difficulties or if the company loses influence on the rapidly growing producers and the service suffers," explains Björn Schmitz.

VIEWER AND ARCHIVE MIGRATION

When evaluating new partners and solutions, the IT team at Barmenia encountered Macros Reply. "In Macros Reply, we found the equal partner we were looking for. We were presented with solutions that were convincing both from their technical and IT point of view – and a viable concept for the migration of the old archive system," André Engelmann, head of e-services, reports on the evaluation phase. The complete project for the conversion of the archive and the targeted ntroduction of a mailbox solution and eFile was divided into three phases. To convince change management in the company with quick successes (quick wins), we started with the transition to the FileNet Viewer offered by Macros Reply. Advantageous here was the extensive experience of the Macros Reply team with FileNet connections. After only nine months, Barmenia benefited from the significant ease of use and performance increases when accessing the archived files with the Macros Reply Viewer. For the first time, the user could add annotations directly in the viewer.

TEN MILLION DOCUMENTS MIGRATED

In the second phase, the conversion of the archive system to EMC Centera was started. In this process, the EMC Centera systems only function as physical storage media. The professional, logical structure of the data and the metadata for description and search are recorded by a database created by Macros Reply, which is also the data basis for the desired iNbox and eFile solution. The IT technical processes, such as the transfer from the scan area to the archive, splitting and merging documents or print management, are managed configurably and flexibly with the Macros Reply middleware eNform. Thus Barmenia remains flexible when it comes to the introduction of new peripheral systems or the design and modification of workflows. In about 12 months, more than 10 million documents were migrated from the original archive to the new Macros Reply/EMC Centera solution. This phase, and during the subsequent transition to the eFile, also proved the success of the collaboration with Macros Reply for Björn Schmitz in other ways: "The IT experts from Macros Reply worked very closely with us. Even at late hours and if necessary on weekends, they were always part of our team. The whole team was always unbureaucratic and target-oriented."

SEPARATION OF THE EFILE FROM THE HOST SYSTEM

After the migration of the archive, Barmenia began with the introduction of the eFile and iNbox solution. The IT team at Barmenia pursued a cross-division, uniform concept for the eFiles in order to minimise operating and development costs by means of this standardisation. At the same time,

the technical and organisational features of the divisions were recorded and mapped by means of the configurable design of workflows and a detailed roles and rights concept. The advantages of this concept quickly became evident: The "look & feel" as well as the operation of the eFile is the same throughout the company, which greatly simplifies operation and maintenance. Today, the employees in the divisions at Barmenia only access the existing systems for technical reference. The jump to the host system takes place directly from the eFile. The eFile application divided into file types such contract file, damage file, customer file and process files always offers the employer a complete 360° all-round view of all files. Even the creation of notes, appointment management or the application information system is performed within the eFile and the Macros Reply Viewer. An additional benefit: the system is browser-based. The sales force can also access the files without having to install cumbersome software clients on mobile computers. The goal of the IT team to standardise the viewer and eFile inevitably led to many discussions – including with the departments. However: whether contract, nursing care or overseas health cover in the Barmenia health insurance division, risk and capital in the Barmenia life insurance division or damage, liability or accident insurance in the composite range – today, everyone works with the same eFile. The experience of Björn Schmitz: "I found these discussions to be incredibly productive and constructive. We have developed many good solutions, even in the details, and then worked together for the defined goals." At this point, the project manager refers to the intensive training sessions as a key to success: "Training is extremely important and helps to master a neat introduction that is accepted by all. As a result, the departments did not report any significant backlogs from the introduction."

INBOX: ATTRIBUTION, AND SKILL-BASED DISTRIBUTION

Parallel to the eFile, the iNbox solution from Macros Reply was introduced. In doing so, Barmenia implemented some specifics for taking advantage of the solution quickly and efficiently in all areas. Incoming documents are read in and

Illustration: Macros Inbox

out by the scanning application SmartFix and can be assigned to the corresponding mailbox automatically and based on rules. All other documents are not automated in this process: instead, they are manually classified by specially trained personnel, so-called verifiers and supervisors, given attributes and electronically forwarded to the mailboxes. To this end, more than 300 process types have been defined. After this initial manual indexing, the documents are filtered through a set of automated distribution rules. In the Macros Reply software, the rules can be flexibly configured and are therefore relatively easy to maintain, modify or expand according to requirements. Today at Barmenia, skill-based factors, technical attributes, prioritisation, campaign allocations and regional responsibilities are used for the distribution to group or individual mailboxes in the transaction processing for the individual divisions. The only exception is the scope of health insurance. A separate mailbox solution was implemented here shortly before the introduction of the Macros Reply solution. Initial considerations of raising the in-house solution to the established Macros Reply platform have been taken and the project is currently at the planning stage.

EFFICIENCY BENEFITS

With the roll-out of eFile and iNbox, the Barmenia insurance group has modernised its transaction processing. The insurance company now benefits from significantly faster, more efficient processing. Currently, additional optimisation measures are being worked on together with Macros Reply. The project team has developed a processing sheet that can be used as a flexible, editable, partially automated form that can be filled in by software and used as an electronic file for the eFile. Björn Schmitz is convinced that they have taken the right path together with the employees of Macros Reply. His tip to colleagues: "eFile and iNbox should be designed as a large, comprehensive project and only then go into departments and individual units. In the long term, this approach is much more efficient than designing pilots for individual departments and then trying to roll out these projects in other departments. The latter procedure creates unnecessary variations, loses operational efficiency and forces a detour in that the systems must be consolidated after the fact." His supervisor, André Engelmann, expressed that he was equally satisfied: "We are talking about a multi-year IT project based on a strategic decision. It takes more than just IT and technical expertise. To successfully manage such complex IT projects requires strong soft skills from the

product providers, service providers and internal employees as well as good intuition. Macros Reply impressed with a migration concept based on a new archive system tailored to our requirements and that can be used as a basis for further future-oriented solutions – without setting off a huge tinderbox of licensing requirements either before or after the event." Heinz-Werner Richter, CEO of IT at Barmenia, speaks in this context of "a flagship project which shows how one can successfully implement a project in a very short time and with a high degree of user satisfaction." Meanwhile, the teams from Barmenia and Macros Reply are working on new expansions to the solution in order to provide the Barmenia insurance group with additional potential for efficiency with the eFile.