

# BARMENIA: WITH SUCCESS – ARCHIVE MIGRATED, EFILE AND INBOX ESTABLISHED

An important component of the success of the Barmenia Versicherungsgruppe is modern IT to support and secure the processing processes. The existing archiving system reached its limits and, after the first pilots with early archiving, wanted to use the advantages of a modern eFile and Inbox solution throughout the Group and across divisions. Barmenia initiated a multi-year IT project with Macros Reply. The archive was migrated with more than 10 million documents from juke boxes to EMC Centera. The partners implemented a uniform eFile and Inbox solution that integrates all relevant functions for workflow organization in clerical processing right up to the jump into the functional inventory systems. Today, the IT solutions developed with Macros Reply represent the basic information technology framework for processing in the Barmenia Versicherungsgruppe. Together with Macros Reply, an efficient, highly flexible and thus future-proof electronic transaction processing system has been established in the company, which makes processing much more transparent, efficient and faster.



**"In order to successfully manage such complex IT projects, product providers, service providers and in-house employees are required to have strong soft skills and the 'nose factor' must be right. In Macros Reply, we found the partner we were looking for at eye level. We were presented with technically and IT-technically convincing solutions – and a practicable concept for the migration of the previous archiving system", André Engelmann, Head of e-services, Barmenia Versicherungsgruppe**

## THE CUSTOMER

Barmenia is one of the largest independent insurance groups in Germany. Around 3,300 employees in the office and in the field manage a portfolio of almost 2 million insurance contracts. The main pillars of Barmenia are Barmenia Krankenversicherung a. G., Barmenia Lebensversicherung a. G. and Barmenia Allgemeine Versicherungs-AG with their offers in the areas of property, liability, accident and motor vehicle insurance. Barmenia lines of business such as general insurance, health insurance and life insurance are very popular with customers. Visible proof of this are numerous awards such as "Most Popular Insurance", "Best Private Health Insurance" or "Test Winner Service" in the field of private health insurance.



## **EARLY ENTRY INTO ELECTRONIC**

**ARCHIVING.** In order to be able to stand out from the competition in terms of quality, speed and reliability, the Barmenia Versicherungsgruppe traditionally relies on modern, high-performance IT solutions. As early as the 90s, for example, the insurance company introduced late electronic archiving, which was subordinate to processing. With BOAS (Barmenia optical archiving system), the company had its own IT system with WORM media (Write-Once-Read-Many) at an early stage. This system was later replaced by the IBM Filenet archiving system. "At the turn of the millennium, the company decided to use the advantages of the electronic file via early archiving in clerical processing as well. The first pilot and area solutions were based on smart FIX as a scanning solution, a separate inbox host solution for distribution and the Filenet archive as a backend," recalls Björn Schmitz, who today works as team leader of the "Input Management" division of the Barmenia Versicherungsgruppe. However, the rapid technological progress, ever new providers on the market and the need for increased integration and workflow orientation of the systems led to the realization: In the long run, proprietary, closed archiving systems have no future. The risks for insurance companies during use and application are great and difficult to control. "For example, in the event of economic difficulties on the part of manufacturers or if their own influence on very fast-growing manufacturers decreases rapidly and service suffers," explains Björn Schmitz.

**VIEWER AND ARCHIVE MIGRATION.** As part of the evaluation of new partners and solutions, Barmenia's IT team came across Macros Reply. "In Macros Reply, we found the partner we were looking for at eye level. We were presented with technically and IT-technically convincing solutions – and a practicable concept for the migration of the previous archiving system," reports André Engelmann, Head of the E-Services

Department, from the evaluation phase. The overall project for the conversion of the archive and the intended introduction of the mailbox solution and eFile was divided into three project phases. In order to be able to convince with quick wins in change management in the company, the company started with the changeover to the Filenet viewer from Macros Reply. The extensive experience of the Macros Reply team with Filenet connections was advantageous here. After just nine months, Barmenia benefited from significant increases in comfort and performance when accessing the archived files via the Macros Reply Viewer. For the first time, the clerks were also able to initiate annotations directly in the viewer.

**TEN MILLION DOCUMENTS MIGRATED.** In the second phase, the migration of the archive system to EMC Centera began. EMC Centera systems act only as physical storage media. The technical and logical structure of the data and the metadata for description and search are recorded via a database created by Macros Reply, which at the same time forms the database for the intended mailbox and eFile solution. The IT processes, such as the transfer from the scan area to the archive, the splitting and merging of documents or print management, are configurable and flexibly controlled by the Macros Reply middleware eNform. In this way, Barmenia remains flexible when it comes to the introduction of new peripheral systems or the design and modification of workflows. In about twelve months, more than 10 million documents were migrated from the original archive to the new Macros Reply/EMC Centera solution. In this phase and during the subsequent conversion to the eFile, Björn Schmitz also proved his worth working with Macros Reply in other ways: "The IT experts at 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 always worked unbureaucratically and purposefully."



## **DETACHMENT OF THE eFILE FROM THE HOST SYSTEM.**

After the migration of the archive, Barmenia began with the introduction of eFile and mailbox solution. Barmenia's IT team pursued a uniform concept for the eFile across all divisions in order to minimize operating and further development costs through this standardization. At the same time, the technical and organizational peculiarities of the divisions were to be recorded and mapped via the configurable design of workflows and a detailed role and rights concept. The advantages of this concept quickly became apparent: The "look and feel" as well as the operation of the eFile is uniform throughout the company, which greatly simplifies operation and maintenance. Today, the clerks in the Barmenia divisions only use the existing systems for technical purposes. The jump to the host system takes place directly from the eFile. The eFile application, which is divided into file types such as contract files, damage files, customer files or transaction files, always offers all clerks a complete 360° all-round view of all files. Even the creation of notes, appointment management or even the application information system is carried out within the eFile and in the Macros Reply Viewer. Another plus: The system is browser-based. The field service can also access the files without having to install time-consuming software clients on mobile computers. The IT team's goal of standardizing viewers and eFiles inevitably led to many discussions – also with the specialist departments. But: whether contract, care or foreign insurance in Barmenia health insurance, risk and capital in Barmenia life insurance or damage, liability or accident in the composite sector - everyone works with the same eFile today. Björn Schmitz's experience: "I found these discussions to be incredibly productive and constructive. We also developed many good solutions in details and then worked together towards the defined goals." In this respect, the project manager points to the intensive training as a key to success: "Training is extremely important and helps to master a clean introduction that is accepted by everyone. For example, the specialist departments did not report any significant backlogs

due to the introduction."

## **INBOX: ATTRIBUTION, AND SKILL-BASED DISTRIBUTION.**

Parallel to the eFile, the mailbox solution from Macros Reply was introduced. In doing so, Barmenia implemented a number of specifics in order to be able to use the advantages of the solution quickly and efficiently in all areas. For example, incoming documents that are read in and out via the smart FIX scanning application are automatically assigned to corresponding mailboxes based on rules. All other documents are not automated, but manually classified by specially trained employees, so-called verifiers and supervisors, provided with attributes and electronically fed into the mailboxes. A distinction is made between more than 300 transaction types. After this manual initial indexing, the documents go through an automated distribution set of rules. In the Macros Reply software, the rules can be flexibly configured and thus maintained, changed or extended relatively easily and according to requirements. Today, Barmenia also uses skill-based factors, technical attributes, prioritization, campaign assignments or regional responsibilities for distribution to group or individual mailboxes in the processing of the individual divisions. The only exception is the scope of health insurance. Shortly before the introduction of the Macros Reply solution, a separate mailbox solution was implemented here. Initial considerations have been made to upgrade the self-developed solution to the established Macros Reply platform and the project is currently being planned.

**EFFICIENCY ADVANTAGES.** With the rollout of eFile and Inbox, the Barmenia Versicherungsgruppe has modernized its transaction processing. The insurance company now benefits from significant speed and efficiency advantages in processing. We are currently working on further optimizations together with Macros Reply. For example, the project team developed a processing sheet that can be used as a flexibly editable form, partially filled out



automatically via software, as an electronic file mirror for the eFile. Björn Schmitz is convinced that, together with the employees of Macros Reply, we have taken the right path. His tip to colleagues: "The eFile and inbox should be designed as a large, comprehensive project and only then go into specialist departments and individual areas. In the long term, this approach is much more efficient than designing pilots for individual departments and then trying to roll out this concept to other departments. The latter process creates unnecessary variants, loses efficiency in operation and, as a detour, forces the systems to be consolidated retrospectively." His supervisor André Engelmann is similarly satisfied: "We are talking about a multi-year IT project based on a strategic decision. This requires more than just IT and technical skills. In order to successfully manage

such complex IT projects, product providers, service providers and their own employees are required to have strong soft skills and the 'nose factor' must be right. Macros Reply convinced us with a migration concept to a new archiving system tailored to our requirements for further future-proof solutions based on it – without having to open a large 'licence barrel' in advance or afterwards." In this context, Heinz-Werner Richter, Chief IT Officer at Barmenia, speaks of "a lighthouse project that shows how a project can be implemented successfully and with a high level of user satisfaction in a very short time." In the meantime, the teams at Barmenia and Macros Reply are working on new extensions to the solution in order to open up additional efficiency potential for the Barmenia Versicherungsgruppe via the eFile.

## MACROS REPLY

Macros Reply digitizes and automates the business processes of insurance companies, banks / financial service providers, subsidies and companies in the energy industry. The basis is the evaluation of the existing process landscape using Process Mining and the subsequent optimization of the modular ECM suite Macros eWorkplace for the seamless document and communication cycle. Every step of customer communication is supported in a consistent and intelligent manner: from Input Management via individualized forms or with classification and indexing (OCR/ICR), automatic distribution to the appropriate mailbox, processing with the aid of eFiles and ePostboxes to Output Management back to the customer. As a further result of Process Mining, Macros Reply implements robots using Robotic Process Automation (RPA) to relieve the employees of monotonous and repetitive tasks and finds implementation options for an adequate use of Machine Learning Mechanisms.

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