

Expanding Global Customer Communication to Meet Customer Preferences

Dynamic process management sharpens competitive edge for Swiss insurer

The Business

Die Mobiliar, the oldest private insurance company in Switzerland, holds the leading position in the market, providing a full range of insurance and pension products and services ranging from property, liability and vehicle to life insurance. Nearly 1.7 million customers rely on Die Mobiliar when it comes to their safety, and every third household and more than every third company are insured by Die Mobiliar. Die Mobiliar garnered the 2015 WfMC Global Award for its new "Mobiliar Korrespondenz System" or MKS.

The Challenge

Die Mobiliar saw documents serving different insurance use cases as an opportunity for the company to communicate and build strong relationships with its customers in different languages and countries, especially across Europe.

With monthly business user correspondence volumes at 70,000 letters, Die Mobiliar recognized the importance of an effective system capable of producing and delivering huge amounts of high-quality, multichannel customer communications in a short time.



The existing system based on Microsoft Word could fulfill only part of the wide range of needs at Die Mobiliar. Document administrators were struggling to effectively maintain hundreds of templates in multiple language variants across the distributed system used by more than 4,000 insurance clerks. Creating thousands of documents from local document templates during their daily work had resulted in uncontrollable growth of template versions and deviations from the corporate style.

Manual data exchange, document delivery and attachments to the insurance cases managed by other business applications also caused considerable time delays and high costs in administration efforts for Die Mobiliar customer communication.

Business Goals

- Enable business staff to handle document design & updates (no "coding")
- Optimize IT resources for technical focus
- Provide faster delivery of customer communication documents
- Minimize time to market for new insurance products
- Speed creation of new document templates
- Simplify document processes to focus staff on customer needs

Functional Requirements

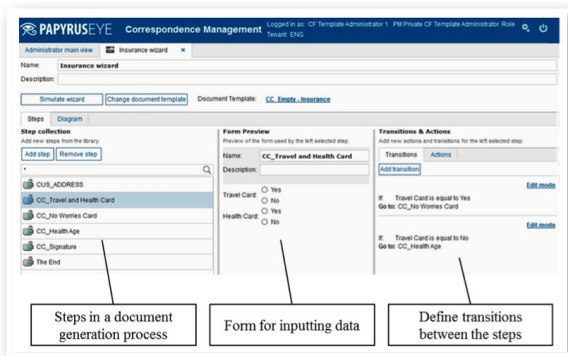
- Manage templates and related processes via one system
- Provide integrated design, maintenance and production
- Ensure change management and versioning for fast-paced document updates
- Automate data exchange between business applications
- Integration of various delivery channels directly into communication process
- Global support for multilingual workspaces, templates and customer documents

The Solution

The new centralized Mobiliar Korrespondenz System based on the business-oriented Papyrus Platform helped the company introduce a new “dual-level approach,” with a process-driven working style that empowers each player to focus on their strengths and promotes collaboration along clearly defined lines of responsibilities.

Business users can flexibly design and maintain content and processes without IT involvement by using a specialized, role-based workplace that integrates all tools and permissions for document and process design. The IT team provides support with more complex and technical tasks like integration to external systems and services, as needed.

To ensure consistency and maximize resources, the MKS allows large-scale re-usability of document components and complements document templates with streamlined processes that allow the front-office staff to focus on customer needs. All document and process templates and resources are managed directly by the system and stored in a versioned central repository, ensuring consistent corporate identity and design.



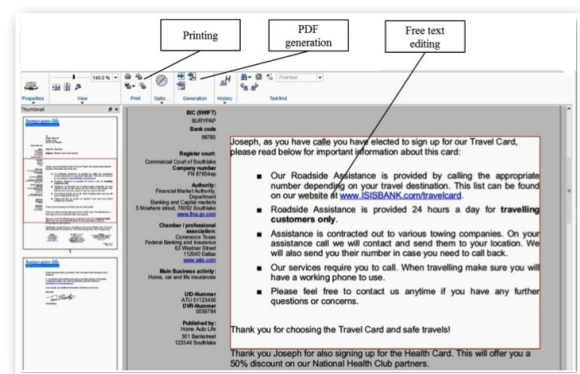
Template administrator creating a document business process

The system also allows the multi-lingual business staff to work in their language of choice regardless of the correspondence language that meets the preference of the recipient.

Supported by a thin client browser architecture, insurance clerks can now access the system independently from their office locations and easily create documents that cater directly to each customer’s needs by simply answering prompted questions. The associated document processes dynamically connect to various back-end services and provide required

data on the fly, note the clerk’s decisions and perform any required work, automatically assembling the insurance document that will exactly match the customer-specific situation, while taking all relevant insurance regulations into consideration and making sure there are no mistakes or omissions.

Once the document is completed, it can be optionally edited by the insurance clerk and locally printed, exported as PDF or delivered to customers by e-mail or fax per selected delivery channels - or even exchanged with Die Mobiliar business applications respectively.



Content editing mode

Using the Papyrus Adaptive Case Management and BPM capabilities, MKS manages the complete document lifecycle from design through execution to delivery according to specific Die Mobiliar policy. The process control is in the hands of the business users, who can perform updates on document and process templates at any time as new business requirements demand, allowing Die Mobiliar to quickly respond to change and seize new opportunities.

The new MKS exceeded expectations for Die Mobiliar, providing results in efficiency, production and service across the organization:

- Reduced number of document templates and improved document quality
- Daily document production increased 20x
- Synchronous data integration from backend systems using Web Services
- Significantly reduced time to market for new insurance services
- Enhanced focus on customer experience

Papyrus Products at Die Mobiliar

- Papyrus WebRepository
- Papyrus Designer Package
- Papyrus DocEXEC
- Papyrus Client
- Papyrus Adapters: LDAP, SOAP, HTML
- Papyrus Server

Snapshot

- **Organization:** Die Mobiliar (Insurance)
- **Business Challenge:** Efficiency in business document production; Seamless backend integration
- **Goals:** Empowerment of business users; Centralized high-quality document creation; Integrated multi-channel delivery; Quick time to market
- **Integration:** Multiple Web Services
- **Solution Frameworks:** Adaptive Case Management, Business Correspondence