

# Policies from the digital document hub

## Success Story | Compart



A major project prompted the VHV Group to redesign their output management. It now revolves around a print pool that bundles and outputs the company’s physical and digital documentation. The numerous digital delivery channels now include E-Postbrief.

When a new application to create documents was introduced in the household contents insurance division, the VHV Group saw an opportunity to modernize its output management (OM). It seemed best to centralize dispatch regardless of the application that produced the correspondence. In other words, all documents would be transferred to the print center via a single channel. The Group therefore decided to set up one central instance to prepare and send out correspondence. Because printed documents were affected first, the company called the solution the “print pool.”

The print pool needed to receive all documents, convert them into the recipient’s desired format, bundle them into postage-optimized mailings, and add any inserts. The solution architects knew that only a technology that supported all analog and digital delivery channels would do. After all, electronic media such as e-mail and E-post were becoming more important in the insurer’s external communications, as was evidenced in the ratio of physical to digital correspondence .

### One system for all channels

Physical output was the first priority. The goal  
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was to hand off the documents to a print provider exclusively as AFP files. Later, when the digital alternatives began to take the spotlight, the corresponding channels would be added to the print pool. Thus multi-channel capability became a definitive selection criterion for the underlying technology of the potential software solution. The software also needed to accommodate all the standard data formats on the input and output side. Finally, it needed to be a good fit for the new correspondence solution, i.e., easy to integrate.

After an extensive evaluation of the different OM suppliers, the choice fell to DocBridge Pilot. Carl Oelker of the VHV Group explains the company’s decision: “The solution from Compart prepares large quantities of data very quickly and reliably and supports all the document formats that exist in the enterprise. The head of informatics/

applications systems also underscored its stability when running in the background. “Software is always good when it supports the user’s daily work rather than making it more difficult.”

### Strategically significant project

The introduction of DocBridge Pilot meant a basic overhaul of the OM landscape, and combined with the simultaneous implementation of the new correspondence solution, was one of the VHV Group’s biggest IT projects ever. The entire household-contents insurance division was switched over to DocBridge Pilot and the correspondence solution. After a short break, other divisions followed, including the residential, accident, liability, automobile, and surety divisions. Several, including the life insurance division, are pending migration. In the end, the

### Executive Summary

The VHV Group, one of the largest German providers of property and life insurance, modernized its document processing and created a central output instance (print pool) for the preparation and output of all correspondence over physical and electronic channels. The DocBridge Pilot solution is the technological underpinning of the print pool and handles various tasks.

# Automatic dispatch

print pool is the interface with the external print provider. Setting up the print pool was the biggest challenge because all the specialist applications that create print output had to be tied in. Michael Amme, Senior Output Management Specialist at the VHV Group: "Thus far we haven't encountered any requirements that we could not implement using DocBridge Pilot. It's important that the specialist departments create the prerequisites for reliable data transfer so the documents can then be sent."

## Seamless document tracking

Most of all, Carl Oelker and Michael Amme appreciate the solution's flexibility. "DocBridge Pilot is a mature, standard software product that easily accommodates new formats and can be adapted to specific needs." For example, the system automatically generates statistics in HTML format at the end of a processing job, thus confirming that production has run properly. The report contains detailed information on the distribution of the pages and documents to



be printed (e.g., division, postage class, and production location). It also gives VHV an overview of the daily, weekly, and monthly document volumes Carl Oelker: "Configuring the statistics feature in the print pool was no problem at all. It ran perfectly right from the start."

Both managers agree the solution allows for excellent research. Every document is assigned a unique 18-digit identifier when it is created.

It retains that unique ID throughout the entire processing cycle, including dispatch, similar to a lot number used for seamless tracking in the pharmaceutical and food industries. VHV uses the identifiers to track when and where a document was created and sent, how many copies exist, if inserts were added and which ones, when it was archived, etc. Identifiers are issued only once, thus ensuring unambiguous lot management.

"The system delivers extremely meaningful data that even a layperson can understand," offers Carl Oelker in praise of the user-friendly analyses. The reports also support completeness checks (e.g., were all pending documents sent and archived?). Bounce management uses the unique ID to identify documents returned due to invalid e-mail addresses. DocBridge Pilot provides the technological basis to automatically route non-delivered e-mail to the appropriate process.

## Automatic dispatch according to defined rules

Physical mailing is strictly controlled. All documents in the print pool by 4:30 a.m. are transferred to the print provider the same day. Some departments have until noon for same day delivery. In each case, the processes are fully automated and the sequence of a process is precisely defined based on urgency.

DocBridge Pilot bundles the documents for postage-optimized mailing. The system automatically suggests categorization into different postage classes, which are forwarded to the external print provider. Thus VHV decides the postal rate used for any given mailing. The print provider is responsible for IT franking, but the print pool itself establishes the necessary prerequisites.

## Print pool: End of the road still not in sight

Automatic insertion of attachments was an important selection criterion for the VHV Group. DocBridge Pilot takes into account the number of resources (stations) the print provider has available for including attachments and bundles the jobs by station. For inserts needed only in small quantities, DocBridge Pilot prints them as well, which also allows them to be personalized with the policy number of the recipient. Any inserts needed for e-mail or E-post are added electronically.

Another feature of the Compart solution that Oelker and his colleagues appreciate is its sophisticated logo handling. Depending on the delivery channel of the document, the system picks the logo to add, if any, and the color. It also suppresses the logo if the application that generated the document already included it.

The VHV Group simultaneously changed over to full-color printing. DocBridge Pilot includes rules that check whether a document should be printed in black and white or in full color. The Compart solution furnishes the necessary resource handling. The goal is to guarantee color fastness and adjust the color space as needed.

There have been two release updates to DocBridge Pilot since its introduction at VHV; the current version is 2.13. The plan is to route all documents VHV creates through the print pool in future. HTML will then be established as the standard format for e-mail dispatch.

### Headquarters

Compart AG  
Otto-Lilienthal-Str. 38  
71034 Böblingen  
Germany  
Phone: +49 7031 6205-0  
E-Mail: info@compart.com

### North American Region

Compart North America Inc.  
30 Bridge Street, Suite 2  
New Milford, CT 06776-3517  
United States  
Phone: +1 860 799 5612  
E-Mail: info@us.compart.com