



# A case for individualists

## Customer Story | Compart



Germany's «best life insurance company» (Focus Money) also relies on quality in its document processing. Individual correspondence (Office documents) at WWK was recently embedded into automated and central document production. The benefit: higher productivity and clerical process reliability as well as considerably lower production costs per mailing. This pioneering project was implemented by longstanding partners Compart and Canon.

If not digital, then optimal. It may sound cryptic at first, but on closer examination this IT project proves to be one of the most ambitious at WWK in recent years. The insurance group, repeatedly named «Germany's best life insurance company» in Focus Money magazine, has been using DocBridge FileCab since the end of 2017. The Compart-developed software collects individual correspondence (Office documents) prepared on user PCs and transmits it to a central printing and mailing instance.

Processing clerks used to have to print individual letters on local multifunctional «floor printers,» review and sign them, include any necessary inserts, and get them ready for pickup by the mailroom. The diversity of insurance products along with WWK's mission to offer customers and brokers the best individual service quality dictates the need for individualized correspondence. Business transactions that cannot be finalized using standard documents require functions for creating individual correspondence. Examples include contract change inquiries, confirmation of benefits, or premium adjustments. In each case, the responsible clerk selects the appropriate procedure. One thing is clear: responses are as specific and wideranging as customer concerns.

In the past, individualization meant that clerks also had to handle the menial tasks (printing, adding inserts, enveloping). Add to that the unnecessary back-and-forth that kept them from their primary tasks. Specialists, managers, and mainly the employees themselves expressed the desire and need for relief, process improvement, and automation. In the end, it was they who initiated the project. They wanted to work more efficiently, free once and for all from the «burden of extraneous tasks.»

### No more running back and forth between the PC and the printer!

So WWK set up its document processing to link individual correspondence with the production steps (processes) of automated bulk processing, thus putting an end to the constant to-and-fro. What could have been

more obvious than embedding individual correspondence into central, automated document production?

First a look at the structures: WWK uses two specialized applications – comparable to an Enterprise Resource Planning (ERP) system – that cover the insurance business. These applications are linked to a central system for document creation, which generates approximately 3.2 million mailings at a print volume of nearly 23 million printed pages: contracts, policies, allowance applications, bonus and value notifications, etc.

The «switching point» between the applications and the print provider (WWK outsourced document production) is an output management system (OMS) designed by Canon that receives, identifies, and classifies the generated documents, as well as adds additional

### Executive Summary

The main reason WWK embedded its individual correspondence into transaction processing (batch) was to achieve higher productivity and process reliability. A plausibility check is integrated into the workflow to reduce to virtually zero the risk of creating documents with errors. The central hub is an output management system (OMS) based on, among other things, DocBridge Pilot to prepare the documents for printing and mailing. This OMS „cooperates“ with DocBridge FileCab software, which „gathers“ all the locally generated correspondence.

# Centralizing Individual Correspondence

information (such as control codes for inserts, enveloping, franking). Within the OMS, Canon provides the COSMOS solution, a comprehensive workflow management system. A third-party product supplies the OM technology to prepare the documents for production and mailing.

The OMS generates standardized metadata that provide the print provider all the information needed for automated production (printing, bundling/sorting, adding inserts, enveloping, franking, handover to postal provider). WWK and the print provider agreed on clearly defined handling rules (e.g., same-day document printing and mailing). Status lists are automatically generated for monitoring this service level agreement (SLA).

## Early plausibility check

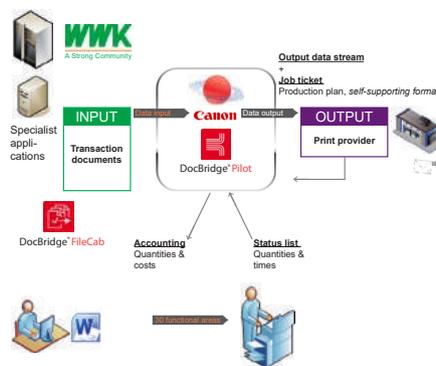
So much for batch processing. But what about the individual correspondence? In principle, the workflow is the same with one exception: the documents originate in an Office program and not a specialist application. In WORD, processing clerks select the document template appropriate for the business transaction from a «digital template cabinet» stored in the system and fill in the recipient address and other process-specific fields.

They then start DocBridge FileCab, which at WWK acts as a printer driver. A dialog box opens with the user-specific functions and features needed for automatic processing. The clerks can check the document against various functional and technical criteria (correct spelling and position of the address, accurate reference line, compliance with corporate identity, etc.), include case-related comments, and add static inserts (PDF files) that are valid groupwide.

If everything is correct and complete, the individual letter is sent to the archive and the central OMS. From there, the workflow is the same as for bulk processing (transaction documents). The workflow at WWK is set up so that DocBridge FileCab collects the documents created on the current 600 PC workstations and transmits them to the output management system, consisting of DocBridge Pilot and COSMOS, where they are centrally processed.

The following graphic illustrates how standard and individual correspondence is processed:

## Print Concept WWK



The choice fell to DocBridge FileCab for a number of reasons. Rudi Wolf, then project manager at WWK: «Compart has an excellent reputation as a specialist in data streams and multichannel-capable output management.» The other Compart solution, DocBridge Pilot, which was implemented along with DocBridge FileCab, also evidenced Compart's expertise. «DocBridge Pilot has major strengths when it comes to mail bundling,» continues the manager. With DocBridge FileCab, a plausibility check prior to printing can be integrated, an option Wolf finds especially fascinating. «This function fits into our application scenario really well.»

## Process reliability, first and foremost

Since these structures were established, processing times in the individual departments at WWK have dropped dramatically. Gone are the days of employees running back and forth to the department printer. Only in rare cases (e.g., for registered mail) are documents still produced locally. Otherwise, everything runs automatically as described above.

And greater productivity is just one aspect. The major advantage of modernization – on this everyone agrees – is the process reliability of individual correspondence. In particular, the integrated quality check early on during document creation takes the pressure off the clerks. Embedding local correspondence into automated standard processing has significantly reduced the risk of selecting the wrong template, adding an out-of-date insert, or using an invalid address.

The WWK anticipates a return on investment (ROI) within 12 months, with shorter processing times producing most of the savings. In any case, so much of DocBridge FileCab's potential is still untapped: not all the individual correspondence of each of the business areas has been integrated. WWK anticipates using the Compart solution for an annual volume of 150,000 documents. A third of this goal was already reached in just the first few weeks after commissioning.



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