

Piloted Policies

Success Story | Compart



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The centralization of document delivery offers a company many advantages. It makes it possible to configure when what correspondence should be sent and how to send it. It also opens up a wealth of options by integrating new electronic distribution channels. One example of this new, flexible world of document output is Barmenia, Germany's seventh-ranked private health insurer.

Five years ago when Barmenia installed new folding and enveloping systems, they also took a close look at document processing overall. It had become extremely complex over the years, limiting the maneuverability of this independent insurance group. Documents were created using different applications (WORD, SAP, DOPIX, in-house applications), each of which controlled the enveloping system. Some programs sorted and bundled the mailings to optimize postage. Only these were not core functions of a typical insurance application. What was needed was a central instance for document output.

Replacing the enveloping system would have meant reprogramming the system's interfaces for every single application. This would have been too expensive and too complex, according to Christian Schrade, a member of Barmenia's output management team. "It was clear that we first had to separate document creation from output before we could deploy the new enveloping machines."

Fit for Every Distribution Channel

Another justification for standardizing output management was the need to introduce additional software solutions for formatting. Here, too, Christian Schrade and his colleagues would have had to invest a lot in the interrelated processes to maintain the status quo. This led them to consider centralizing document output to ensure greater flexibility when integrating additional systems. But one question remained – What underlying technology should be used?

Above all, the IT solution would have to seamlessly integrate the wide variety of applications used in the company, as well as support every current and future physical and digital distribution channel, such as smartphones and tablets. For Barmenia, digital means were extremely important since the insurer was sending more and more documents electronically. For example, sales partners are already receiving copies of insurance policies electronically. "Before we just weren't flexible enough to tie in new output channels," explained Ansgar Schneider, team leader of the output management team at Barmenia. "But it's no problem at all with DocBridge Pilot." The solution

Executive Summary

Centralizing document delivery offers a company many advantages. It allows not only configuring when what correspondence should be sent and how. It also opens up a wealth of options by integrating new electronic distribution channels. One example of this new, flexible world of document output is Barmenia. Germany's seventh-ranked private health insurer uses DocBridge Pilot, which controls the digital and physical output of all documents. DocBridge Pilot has been running successfully at Barmenia since 2012, automating more and more processes since then. In particular, the employees who process returns reap the benefits – they no longer need do this task manually.

Centralization of Document Delivery

developed by Compart covers all the standard document processing steps in a single system – analysis, modification, classification, conversion, splitting, merging, bundling, output and archiving – version 3.0 even offers an automatic reprint function. By the way, early this year an overwhelming majority of readers of Post-master Magazine selected the platform-independent and infinitely scalable solution as the “2013 Product of the Year”.

Compart is Hardly an Unknown

Compart is no stranger to Barmenia. The insurance company had chosen a product from the specialist in multi-channel document management once before, with great results. In 2005 Barmenia needed a powerful tool for converting metacode print data and PDF inserts into AFP files and learned about DocBridge Mill, which is still successfully in use today. A trusting and constructive cooperation developed over the years, which surely played a role in Barmenia's current choice, as both Schrader and Schneider attest. They had gained a lot of earlier expertise with the DocBridge architecture, which was extremely helpful as they implemented the new Compart solution.

Ansgar Schneider: “DocBridge Pilot was easy to customize to our individual requirements, as evidenced by the seamless integration of our Lotus Notes server for faxing.” The IT manager also reported that electronically integrating the sales partners into the new system was no major technical feat. He is also pleased that individually created documents can now also be scheduled for delivery. DocBridge Pilot automatically sends the document over the appropriate channel on the scheduled date.

Returns are Processed Automatically

DocBridge Pilot has been running successfully at Barmenia since 2012, automating more and more processes. In particular, the employees who process returns reap the benefits – they no longer need do this task manually. The Compart solution assumes the metering task and assigns every delivery an ID number (in Data Matrix code). If the address in the insurer's customer database is no longer valid, Barmenia receives an electronic data record (CSV file) from the Deutsche Post with the ID and new address. This is automatically copied into the database and the former address deleted. If a mailing cannot be sent at all, Barmenia is also notified automatically with a message that is saved as an open process in the electronic mailbox of the responsible employee. An external service provider is commissioned to obtain the new address. In both cases, the stored ID number is used to assign the record correctly.

Even though automated returns-processing was not in the original plan, neither Schrader nor Schneider could do without it now. By uncoupling creation and output, they explain, they are so much more flexible in terms of downstream processing. As soon as a change in enveloping or print is pending, only one interface needs to be set up. For the two IT managers, this easier way of handling of changes to the workflows is a major advantage of DocBridge Pilot. Add to that the five-figure savings in postage Barmenia was able to realize by installing Compart software.

The Final Gap is Closed

Just eight weeks after the software was implemented in the summer of 2011, Barmenia was producing half of its total output with DocBridge Pilot. Complete conversion took a total of one year from the first workshop, and the implementation was relatively pain-free. Ansgar Schneider: “The biggest challenge was a major campaign related to the rate restructuring; we sent out nearly 460,000 mailings using the new solution. It had to work right out of the gate, because notifying the customers about new rates is a sensitive issue.” This hurdle was successfully cleared thanks to excellent support from the Compart consultants. “The transfer of knowledge between us and the service provider was excellent.”

For Schrader and Schneider, much still lies ahead for output management. In spring 2014 they are upgrading to the new release, DocBridge Pilot 3.0. They plan to set up a closed loop between the Compart solution and the enveloping system, i.e. seamless logging of completed jobs. In view of the growing complexity of document processing and increasing individualization, this check is critical for high process security.

Headquarters

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

Northern European Region

Compart Deutschland GmbH
Otto-Lilienthal-Str. 38
71034 Böblingen
Germany
Phone: +49 7031 309605-0
Email: info@ner.compart.com

UK Office

88 Wood Street
10th and 11th floors
London
EC2V 7RS
United Kingdom
Phone: +44 782 4337887
Email: info@compart.com

www.compart.com