

Achmea Optimises Policy Records Management with Global 360 Business Process Management Solution

The Challenge

Achmea had a long 'wish' list for its various processes that needed to be ameliorated. The initiative to do something about their business processes was triggered by the desire to streamline business processes and to optimize the various complex work processes. Achmea therefore wanted to create a digital filing environment with a digitally controlled workflow so that policy records management tasks can be performed with greater speed, greater efficiency, and greater accuracy. A better-organized work process starts with incoming messages – post, e-mail, telephone notes and faxes are now distributed digitally. For example, more than 1,000 items per day are received by post. These are scanned in the mail room and indexed by means of a link to the related policy records management system, before entering a central work queue. The indexing system automatically forwards them to the appropriate location in the business process. E-mail, faxes and messages related to the millions of telephone calls received by Achmea each year are also indexed and allocated to the proper files and people.

The Solution

To use the Global 360 solution at full speed, various project steps were set up. The main visible solution is that Achmea changed from total 'paper' environment to a digital file management environment. This changes the productivity dramatically in a positive way.

Challenges

Achmea wanted to have a better-organised work process. This had to start with incoming messages – post, e-mail, telephone notes and faxes are now distributed digitally. For example, Achmea receives more than 1,000 items per day by post. Achmea wanted to streamline operational processes in the records management workflow. They wanted the right information in the right location, improved and quicker availability of files, serving customers with greater speed and efficiency.

Goals

By using Global 360 Achmea was able to digitize all their operational processes in a fast and efficient way.

Results

This system allows Achmea to increase its efficiency by 25%. Less time is wasted looking for the right information and files, which allows customers to be served better.



Customer Overview

Handling more than 1.2 million life and pensions policies, Achmea is one of the largest insurance companies in the Netherlands. The company has nine business units involved in insurance and financial services. The Achmea Group includes 'brands' such as Zilveren Kruis Achmea, Centraal Beheer Achmea, Avero Achmea and Staalbankiers. Operating from various locations in the Netherlands, the newly established Shared Service Center Life & Pensions supports insurers in the centralized processing of policy records. Achmea employs 22.000 people.





Impact on Business

Insurance company Achmea has implemented Global 360's Business Process Management solution for the efficient, digitized performance of all of its policy records management tasks. This results in greater customer satisfaction and higher quality customer service.

Achmea programme manager Rob van Gennip says: "The post room operation is now much more efficient. In the past, delivering a postal item might have taken as long as 20 minutes. That no longer happens. Since postal items and files are indexed, they no longer get lost." Another advantage is that Achmea has been able to eliminate the dozens of plastic mailboxes in each department as well as the filing cabinets, which used to take up a significant amount of floor space. Furthermore, the new system allows it to handle customer calls in a more efficient, goal-oriented manner.

From 1 April 2006 onwards, paper files are eliminated and the work process on 1,200 workstations is since then fully digitized. Some checklists are simple and only involve a few checks, whereas others are more complex and involve various checks. The checklists are maintained electronically in the Document Information System/Workflow-Management (DIS/WFM) system by the company's own Support organisation. Based on the values entered by the user in the index fields, the checklist that must be followed for a specific activity is displayed when that transaction is being executed. Digital checklists reduce the chance of errors. Important conditions for complying with SAS70 certification, i.e. regulations applicable to quality assurance in records management environments, include the accurate description of processes and the checklist-based execution of process tasks. Achmea must comply with these regulations internally, so random checks are carried out afterwards to verify whether the processes have adhered to the agreed criteria. These random checks also provide information on any problems occurring during the process.

The business process data collected by the system in turn feed reliable information into the management information system. This allows supervisors to make accurate forecasts, e.g. budgets and workload (how it will be affected by the amount of work distributed over time or in relation to the number of days off, or work per team or employer). The supervisors, or managers, can execute their tasks more efficiently by the set up of the Global 360 software.

The management information system also provides information about the productivity of each employee and of the turnaround times. Van Gennip: "Overall, employees now spend considerably less time on overhead issues and can focus more on their core work. This will allow us to increase our productivity by more than 20% and save several million euros. Additional benefits include a reduced need for floor space because fewer workspaces and fewer filing cabinets are required. This alone saves us half a million euros per year."

Impact on Participants

The users, participants, themselves set out the criteria for the system, defining the work process in detail. They were closely involved in the whole process. "The whole system has a generic set-up," explains Mahmut Ceylan, project manager at Atos Origin, which manages the Achmea project. "We first mapped out all the processes and team lines. From this, we distilled a general process description that is sufficiently specific for the business process and at the same time allows each department the flexibility to determine its own work method. For example, departments can be easily linked to the Document Information System/WorkFlow-Management (DIS/WFM)." The generic set-up makes it very easy to link new departments to the DIS/WFM system. Employees notice very little change in the actual working method. The main difference is the transition from a paper-based to a digital work environment. In order to simplify this transition the DIS/WFM has been equipped with familiar features for virtually all "records management tasks", such as pasting Post-it notes, and cutting and copying documents. The new digital business process is skills controlled, this means that employees get to see the work that is relevant to them and for which they have been authorised. This approach is strongly related to the persona-based approach of the business process management software of Global 360. Out-of-the-box "userView" applications are ergonomically built to maximise productivity of each type of end user.

For example, less experienced staff will only see simpler types of transactions. The system with its generic set-up can thus be adapted to the specific level of each individual user. When performing their tasks, employees are supported by checklists that take into account product types, transaction types, tax rules, risk areas, and other aspects. The system has the intelligence to verify whether specific key documents are present.



Impact on Managers

From the point of view of the participants, the direct users of the system, it is always quite hard to adapt a new way of working in an easy and smooth way. It is up to management to coordinate this fast and easy. Van Gennip explains how they managed the acceptance of the new system: "The critical point in the transition to a new, BPM-controlled work method is employees' resistance to a paperless work environment. We now require that the transition must be made by the whole department so that everyone is in the same position. Communicating with employees and establishing trust is absolutely critical in this process. We give departments time to adapt to a new work method and the freedom to make their own adjustments to the system. This new work method also means that employees will now be accountable for their own work instead of relying on a planner. Tasks are automatically allocated, with the flexibility to deviate. This change in thinking should not be underestimated."

With the persona-based approach of Global 360, the whole organization is involved in creating the new way of working. From developers up to users and managers, they are all responsible for creating the new environment which is business process driven. A great buy-in or generating a positive approach is as central as the business process modeling part is.