AMPLEXOR

EMBRACE THE FUTURE

MOVING FROM PAPER TO DIGITAL INSURANCE UNDERWRITING WITH ALFRESCO AT CREDENDO GROUP

CREDENDO GROUP

As a European trade insurance group present across the continent, Credendo Group is active in all trade credit insurance sectors, providing a range of products that cover risks worldwide. To streamline the evaluation process, AMPLEXOR helped Credendo move from a paper to a digital administration.

Credendo is the official Belgian export credit agency. Its mission is to promote international trade relations, providing companies and banks with trade credit insurance against medium-term and long-term political and commercial risks worldwide. This business mainly relates to capital goods, contracted works, industrial projects, and services.

An important part of the insurance process is the evaluation of insurance requests, looking at the feasibility and determining the pricing. At Credendo the Underwriting & Account Management Department carries out this evaluation of these often sensitive and complex cases. From a commercial point of view, speed and accuracy of evaluation are of the utmost importance. During the process, information from multiple sources is assessed and consolidated. Credendo was looking for a digital solution that could provide an integral and transparent overview of the decision-making process.

Other parts of the insurer have a digital workflow, but this part of the organization was still largely working with a paper-based administration and locally stored files. This was not efficient for the people handling the cases; it also made it difficult for management to determine the department's performance. It was time for a change, and AMPLEXOR was called in to give them the digital case management solution they needed.

THE CHALLENGE

Delivering the new tools to the underwriting department on time was extremely important, as Credendo wanted to decrease the time spent on evaluating insurance requests and create a transparent workflow that provided insight at every step of the process. This introduction of a case management system instead of a pure process-driven Business Process Management solution was a crucial challenge: it would decrease the complexity of the workflows and increase the agility of the department.

a textbook example of how having a
dynamic and excellent working relationship

When Credendo sent out the request for proposal (RFP), it included detailed workflows. It had also already performed an extensive business analysis. This made it easier for AMPLEXOR to propose a solution that would match the customer's request exactly. In fact, looking at the RFP we suggested some extra functionality we believed would improve the design even further. Credendo's business analysis was used as a very good starting point for the functional analysis performed by AMPLEXOR and validated by a selection of business key users and transformed into a technical design and analysis as input for our developers.

At this point, it was determined that the solution would need to:

- Manage digital documents within a case

- Support the operational activities using case metadata, reminders, activities, history, and (simple) workflows

- Support the daily case-related activities and guide users by providing them with a complete overview of cases, their documents, and related activities/tasks and reminders

- Possess flexible reporting functionality, including Excel exports

An important extra requirement was that the new case management solution could interface with an existing SAP solution, which is used as a financial information database. As Credendo wanted to retain this, we set up a lightweight integration to import master data from SAP into Alfresco.

HOW WE DID IT

The project for Credendo is a textbook example of how having a dynamic and excellent working relationship between technology provider and customer can lead to impressive results in a short space of time. As usual, we used an agile approach during this project, with short 'sprints' during which specific components are built, tested and feedback is given. This approach works very well if the customer is very engaged during tests and discussions, as was the case here. In fact, Credendoassigned its own project manager who started work on this project six months beforehand to ensure that all communication between the company and AMPLEXOR went well.

"Without their upfront detailed preparations as well as the maturity and drive of the customer's project manager, this challenging project would not have been possible"

Tom Laureys
ECM Business Consultant
at AMPLEXOR

between technology provider and customer
can lead to impressive results

To ensure the best feedback was received during the agile sprints, an internal 'ambassador' was appointed for each involved subdepartment to provide input to the project manager. This method had the added advantage that these ambassadors could inform and train their colleagues and bring back to AMPLEXOR possible concerns from these future users. As the new case management solution would have quite an impact on the workings of the department, having these ambassadors involved at an earlier stage helped in change management and getting everyone on board right from the start.

As said, Credendo provided a business analysis that served as a good basis for all that came after. This also allowed us to start developing quite early, in sprints of three weeks. At the same time the functional analysis continued in the background, identifying new needs and requirements, until the fourth sprint. This approach was also necessary as we needed to build the solution in a relatively short time.

What also made this project easier was that Credendo defined the 60–70% of functionality that really was required in the solution. The remaining 30% was divided into 'Shoulds', 'Coulds' and 'Won'ts', which would be built if budget and time allowed. This was a great advantage, as it helped everyone to establish the correct priorities. In the end, we managed to build nearly everything within budget, sometimes using workarounds.

The technology base for the case management solution we built was Alfresco, a powerful and versatile open source solution. Credendo was already working with the software, so they themselves chose to continue working with Alfresco. The company also would supply and maintain the hardware, whereas we provided disaster recovery and security procedures, which were tested extensively.

THE RESULT

The case management solution for the Underwriting and Account Management department was received very well. Pretty much all functionality requested was built. Search and reporting features allow users to retrieve sets of specific cases, documents, reminders, history items and workflows based on metadata searches. The reporting features allow for a transparent follow-up of case handling, which was an important request from the management.

"This project went exceedingly well, and there were many reasons for this. I believe it was due to several factors, such as the thorough preparation of the workflow and RFP by Credendo, the highly skilled analysis by AMPLEXOR, the enthusiasm, technical knowledge, professional attitude, and necessary flexibility of the on-site team, the professional project management and clear communication from our side, and the support of the Credendo management"

Steven Deneir
Project Manager
at Credendo

"Thanks to a committed and focused AMPLEXOR team and an engaged customer, this project was delivered on time, within scope, under budget, and with great satisfaction from all parties"

Rika Michels
Project Manager
at AMPLEXOR

ABOUT AMPLEXOR

AMPLEXOR is a leading digital solution provider offering global compliance, digital experience and content solutions. We help customers achieve process efficiency, increase revenue generation, reduce time-to-market and ensure quality and compliance. Our state-of-the-art solutions support core industry processes, and include software technology, consulting, system integration, and language and content management services. We provide combined solutions and services to in the fields of aerospace & defense, automotive & manufacturing, energy & environment, finance, life sciences, and the public sector.

AMPLEXOR is established in 22 countries with more than 1.800 employees across three continents.

AMPLEXOR