



“ECM is both a prerequisite and an important step towards digital insurance.”

Markus Saladin,
Head of the ECM Program/Head of Information Management Solutions at Helvetia

Best Practice



Company	Helvetia
Topic	Launch company-wide ECM as the basis for digital transformation in insurance
Industry	Insurance
Employees	Approx. 6,500 (worldwide)
Turnover	8.6 billion CHF
Headquarters	St. Gallen, Switzerland
Integration	CRM, business applications, customer portal, intranet, partner management
Project Scope	Switzerland

Challenges

- Complex, heterogeneous IT landscape with redundant systems for information management processes
- Lack of cross-system view of customers, partners and business cases
- Difficulty in mapping flexible processes

Targets

- Establish more efficient and transparent case processing
- Improve cross-location cooperation
- Fulfill customer need for better information from employees and shorter processing times
- Replace legacy systems
- Enable new operational models

Solutions

- Archive, DMS, BPM and digital workbaskets for all divisions
- Workflows for flexible mail and task distribution according to capacities and expertise
- Digital customer records
- Integration of CRM and business applications

Project Overview

Starting Point

The Swiss insurance group Helvetia provides non-life, precautionary and specialty line solutions to more than five million customers. The IT landscape had grown over the years, but could no longer fulfill the requirements of modern customer interaction: Helvetia lacked flexible processes and cross-system information management. For this reason, the insurance provider decided to pursue a group-wide digitalization strategy based on Doxis4. Automated workflows optimally distribute mail and tasks in relation to employee expertise and capacities. Employees at every location have access to all relevant information through the digital customer records.

Why Doxis

- Know-how of SER and straightforward collaborative work
- Functional scope and quick out-of-the-box deployment of ECM software
- Future-oriented, extendible platform technology
- High usability, strong BPM engine and collaboration options

Solutions

- Doxis4 software with archive, DMS, BPM, digital workbaskets and digital customer records for correspondences, medical documents, financial statements, policies, claims, etc.
- Workflows for flexible task distribution and original orders; management of undeliverable items and archiving
- Multilingual software in English, German and French

Integration

CRM, business applications, customer portal, intranet, partner management

Document volume

Approx. 115 million documents (2015); annual growth: ca. 6 million documents

Users 2,500, planned increase to 4,000 (70% in-house)

Implementation

- By mid-2018: Build basic infrastructure
- Starting mid-2018: Division-by-division migration of legacy archives to Doxis
- Implementation of first workflows and customer eRecords with Doxis
- Next steps: Successive roll-out of ECM and BPM in all divisions, including sales as a cross-sectional system; continuous process optimization

Value

- Improved customer service through faster, more transparent case processing and better ability to provide information
- More efficient collaboration through multilingual, cross-departmental and cross-location process and information management
- Streamlined system diversity, simpler and automated processes

Used Doxis Modules

Search

- Text mining
- Keyword
- Full text

Integration

- Business applications
- Customer portal
- Intranet
- CRM

Input

- Email

Capture/entry

- Capture/Scan

Doxis

Clients

- Windows
- Mobile
- Web

Retention

- Archive
- DMS

Files & Processes

- eRecords
- Workflow

Extraction

- Inbound Invoice
- Inbound mail