

Monceau Assurances Improves the Quality of Customer Service

Document Management streamlines processes and generates competitive advantage while maintaining technical simplicity and cost effectiveness

Monceau Assurances includes mutual insurance and insurance companies operating in the three major fields of insurance — life insurance, damage insurance, and reinsurance.

The group has offices in all parts of France as well as in the French Overseas Territories. The group has a total workforce of 300 and a turnover approaching 450 million €. Total assets managed stand at 4 billion €.

“With the assistance of Stream Consulting, a consulting company specialized in dematerialization solutions, we were able to define all the Electronic Document Management system’s contributions to our organization and the improvements that could be made to our working processes,” stresses Bruno Depeyre, Director of Organisation and Information Systems at Monceau Assurances.

The study allowed Monceau Assurances to define its strategic objectives:

- Strengthen archiving security (digital archive base with document access rights management)
- Facilitate and optimize records management processing
- Multiple and direct access to documents in customer records
- Improve verification tools (signatures and strategic documents)
- Transmit customer documents to the right management departments according to the stages of processing or need for information
- Reduce the reproduction, printing, manipulation and forwarding of documents (access to archives, sending to distribution networks, etc.)
- Increase productivity by reducing archive searches and filing errors, eliminating data entry, etc.
- Add to information available about the customer, to improve processing quality and therefore customer quality

“With the document management solution, we have largely exceeded the objectives set at the outset in terms of functionality, and the project has been carried out successfully within the forecast timeframe and budget.”

Bruno Depeyre,
Information Systems and Organization Director

Industry

Insurance — Mutual Insurance

Customer

Monceau Assurances

Business Challenges

- Integrate the document management solution into the Monceau records management processes and chains
- Increase archiving security
- Facilitate and optimize record management processing
- Improve customer service quality

ECM Components Used in Solution

- **Document Management — for dematerializing customer records**

Business Benefits

- A comprehensive, flexible and upgradeable software package
- Cost effectiveness and technical simplicity
- Long-term technical validity of the solution and document conservation

A functional and technical choice

“During the opportunity study carried out in close collaboration with the project manager, we were very quickly able to identify the potential scope and contribution of an Electronic Document Management System within our life insurance management system and define its target functions,” said Depeyre.

“The chosen methodology used by Stream Consulting first of all involves benchmarking the market’s most appropriate solutions for the functional and technical scope that we have defined, thereby enabling us to more accurately target our consultation.”

Once the protocol model has been established, the next step consists of assessing the short-listed offers in very concrete terms, bearing in mind that our priority criteria were as follows:

- Technical durability of the solution (publisher’s stability, platform standards, etc.) and document conservation methods (guarantee of format readability and reversibility)
- Integration into our IT architecture
- Simplicity of installation and solution flexibility
- Full functional scope coverage — comprehensive solution including the upstream phase (Kofax)
- Solution costs

Accomplishing objectives with comprehensive, flexible and upgradeable Document Management solution

Deployed at the end of 2004, the dematerialization solution enabled all customer documents and records to be made accessible online, so that managers could access DEC’s (electronic customer files) from their own workstations. These concerned the mutual insurance company’s life insurance activity — digitization of incoming documents (contracts, amendments, correspondence) and outgoing document storage (produced by the issuing system and office systems correspondence). The solution is interfaced with the management system and document issuing system.

Processes improvements include:

- Structured file of documents exchanged with the customer
- Automatic archiving of outgoing documents (contracts, statements, etc.)
- Automatic reading of documents replacing low added value manual input
- Automatic mass processing
- Reduction of the mass of paper documents to be printed and archived
- More fully comprehensive records (more information available than before)
- Possibility of issuing documents online (duplication, etc.)

The project exceeded original objectives

Monceau Assurances was able to identify an improvement in customer service quality and a significant reduction in document processing volumes:

- Archiving workload (50% less physical filing of documents taken out for consultation and a reduction in file manipulation)
- Only contractual documents signed by the customer are archived
- All customer information instantly available for new contracts
- Printed copies of documents, and forwarding to regional offices, cut by half
- Customer service quality

“The project was carried out successfully and won immediate approval from all its users — a positive outcome resulting from a high degree of implication by the operational teams (life insurance activity managers). They fully endorsed the approach to the solution and the concept of adopting a common in-house project leader/project manager process steered by our partner, Stream Consulting. We are now planning a progressive deployment to regional delegations and ultimately, outside users,” concludes Depeyre.



Sales	Americas	Europe	Asia/Pacific	
<p>www.opentext.com sales@opentext.com</p> <p>North America Sales 1-800-499-6544</p> <p>International Sales +800 4996 5440</p>	<p>United States 100 Tri-State Int'l Pkwy Lincolnshire IL 60069 Phone: 847-267-9330 Fax: 847-267-9332 Toll Free: 1-800-538-7723</p>	<p>Germany Technopark 2 Werner-von-Siemens-Ring 20 D-85630 Grasbrunn Phone: +49 89 4629 0 Fax: +49 89 4629 1199</p>	<p>United Kingdom Grosvenor House Horseshoe Crescent Beaconsfield Buckinghamshire HP9 1LJ Phone: +44 1494 679700 Fax: +44 1494 679707</p>	<p>Australia Level 12 65 Berry Street North Sydney, NSW 2060 Phone: +61 2 9026 3400 Fax: +61 2 9026 3455</p>

If you're an Open Text partner or customer, visit online.opentext.com for more information about this and other Open Text solutions.

Open Text is a publicly traded company on the NASDAQ (OTEX) and the TSX(OTC).