



## Irish Life

### Industry

Financial Services

### Customer



Irish Life

### Challenges

Replace time-consuming, paper-based processes with automated systems to improve visibility, standardise processes and enhance customer service.

### Solution

Implemented Execute360 and managerView to automate workflow, enhance reporting and improve decision making.

### Benefits & Results

Increased productivity by 35%, boosted staff morale, improved customer service and enabled the business to confidently expand into new markets.

### Overview

Irish Life is part of the Irish Life and Permanent group of companies, one of Ireland's largest financial organisations and the market leader in the provision of life, pension and investment products.

With a focus on quality and personal service, Irish Life offers a wide range of financial products including company and personal pensions, savings products, life cover and insurance policies to individual and corporate customers.

### Challenges

With 4,000 employer customers encompassing 470,000 individual employee customers, and with customer relationships spanning more than 20-30 years, Irish Life Corporate Business was drowning in paperwork. Facing a tremendous challenge to process, manage and store the paper documentation associated with its employer sponsored pensions, Irish Life struggled to handle customer correspondence quickly and efficiently.

"We needed to take the paper out of the system to improve responsiveness, accuracy and quality for our customers," explains Paul O'Neill, Head of IT and New Developments - Corporate Business IT.

The business had grown by 50% but Irish Life had little visibility across its business processes. And with a team of 300 already in place, employing more staff to manage the paperwork was not sustainable. Instead, Irish Life embarked on an ambitious process engineering programme to overhaul the 150+ processes involved in running the business—the mantra being, "Deal with today's work today."

### Solution

"We could see that there was a gap for imaging software, workflow, automated routing and automated capture of work," continues O'Neill. "Working with our implementation partner Zarion, we adopted a shallow and wide approach to scan, capture, index and file all work across the entire business."

With 800 items of work coming in every day, there used to be a huge amount of photocopying. All document capture is now automated and standardised and jobs are allocated to the teams by 10am on the same day—a tremendous improvement on the 24 hours it previously took for correspondence to arrive from the post room.

Manual management processes have been replaced by standardised work management for complex multi-step processes and one-off activities alike. In addition, key processes for renewals, credit control and cash management have been automated, helping to improve productivity, visibility and customer service.

## Results

### Impact on Managers

“Before, we used to spend a lot of time just managing the queue of work and moving work around. We realised there had to be a better way. The improvements since implementing MIDAS have been very significant. We’re now completing 99.9% of jobs in 5 days,” says Donal O’Carroll, Director of Technical and Shared Services.

Visibility has also improved with real-time reporting. Beforehand, reporting was a time consuming task carried out by the IT department but now managers can quickly produce their own reports when required. In addition, if there is an issue with a particular case, it is instantly visible to managers and any problems or queries can be quickly addressed.

“We can now immediately see which teams are under pressure and which have excess capacity and can re-distribute the work accordingly. This has enabled us to handle 60% more queries this year with less people, in comparison to last year,” explains Eoghan Burns, Director of DC Operations and Finance.

### Impact on Participants

Individuals are now recognised and rewarded for the work they have done and with clearer visibility of work-loads and the removal of backlogs, the stress on employees has been significantly reduced.

Paula Martin, Senior Manager – Defined Contribution (DC) operations explains, “Now everything is in order, people have got used to the system and they depend on it. Work is automatically routed to the correct teams which saves a tremendous amount of time. It used to take up to a week to find a piece of correspondence; but now everything is at our fingertips and it takes just a matter of minutes.”

Many of the manual jobs have been automated, freeing up staff to concentrate on value-added tasks such as customer service. People are delighted to work in a company that can guarantee service level agreements. Morale has increased and staff turnover has reduced from 20-30% in 1999 to just 6-8% in 2009.

### Impact on IT

The overall solution, known internally as MIDAS, has become a mission critical solution for the business. Visibility has greatly improved and a key objective of standardisation has been achieved. David Harney, CEO says, “It’s been the best thing IT has ever done for the business.”

Overall the service level agreement of 6 weeks has been reduced to just 18 days representing a significant improvement in Irish Life’s ability to manage its workloads. A business process management culture has been adopted throughout the business, including language, business case measurement and methodologies and so far, a 35% gain in productivity has been achieved.

### Impact on the Business

Irish Life Corporate is enjoying a 35% productivity gain and other areas of the organisation are keen to implement the system. While Irish Life was already considered market leader in terms of customer service, MIDAS has helped to widen the gap even further. With the solution in place, Irish Life is now well placed to expand into new markets, something that would have been impossible with the paper-based systems.

David Harney, CEO concludes, “We now have a very solid and consistent infrastructure across the business. This enables us to look at processes in a much more disciplined way and immediately see where productivity improvements can be made. We are sure that we can deliver a further 20% in productivity improvements over the next 3-5 years across the business.”

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