Case study: VOLKSWOHL BUND

Pitney Bowes software is helping the VOLKSWOHL BUND group of insurance companies to optimise its customer communication procedures

In cooperation with Xerox, VOLKSWOHL BUND has integrated Pitney Bowes P/I Output Enhancement software. This software enables documents from several sources to be combined into one print job, thus considerably boosting productivity around the despatch of customer communications.

Headquartered in Dortmund, VOLKSWOHL BUND Lebensversicherung was founded in 1919 and today offers its private customers a wide range of products, such as life and annuity insurance covers. VOLKSWOHL BUND now services in excess of 1.3 million policyholders with access to a network of more than 13,000 brokers, insurance agents and independent financial service providers.

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An act with consequences

The Insurance Contract Act, VVG for short, has been in force in Germany since 1908. It defines the statutory framework for cooperation between insurance companies and policyholders. In 2008 the act underwent fundamental reform. Since that time it has been necessary for customers to be aware and in possession of all the contractual conditions prior to the conclusion of an insurance policy

Upon request a customer can, for example, be sent a quotation including all the terms and conditions of insurance. The customer signs a declaration of consent which they send to the insurer, together with additional documents. The documents received from the customer are scanned and electronically archived. The final policy dispatched to customers not only comprises contract text generated by the contract management system, but also copies of the documents submitted by the customer from the electronic archive. Thus, for policy dispatch purposes, it is necessary to amalgamate components from several systems based on different IT platforms.

"The software which we were previously using could no longer perform this task and an upgrade was not possible", explains Bernd Ortmann, Head of IT Operations at VOLKSWOHL BUND. There was also considerable time pressure: once the existing software had been evaluated – and found to be unable to meet the demands of the reformed act - VOLKSWOHL BUND was left with just three weeks to implement new, compliant software.

Old partners – new solutions

The experts at VOLKSWOHL BUND not only required a solution able to fulfil the technical requirements, but also one which could be deployed in a short period of time. The answer was suggested by a long-standing partner of the insurance company - X-NRW, Xerox Deutschland's sales channel in North-Rhine Westphalia. X-NRW suggested the Pitney Bowes P/I Output Enhancement software from its sales portfolio. The insurance company first began using the Pitney Bowes P/I Output Management software in 2004 in order to enable outgoing post to be sent to an electronic archive parallel with the Xerox print job. All three partners can therefore look back on a trusting level of cooperation which has grown over the years.

Since then, all VOLKSWOHL BUND's paper-bound customer communication - such as contract conclusions and accompanying information - which encompasses at least two million pages a month, has been processed using this software system.

Xerox and Pitney Bowes succeeded in implementing the P/I Output Management software within just three weeks. WR-Concept, a Xerox Deutschland system consulting subsidiary, assumed individual software adaptation responsibility. Christoph Häbel, Software Account Manager at Pitney Bowes and the contact for the project with VOLKSWOHL BUND, states: "In our view, our very good and long-standing partnership with Xerox Deutschland, X-NRW and WR-Concept is one of the main reasons why we were able to implement the P/I Output Enhancement software at VOLKSWOHL BUND in such a short space of time. Such a task can only be performed with a well-coordinated team."

The uncomplicated, user-friendly nature of the software, together with the high degree of functionality, were key factors in VOLKSWOHL BUND opting for the Pitney Bowes solution. Describing the new application's advantages, Bernd Ortmann comments: "Due to the introduction of a new document creation system and new processing requirements, switching to a centralised output management system featuring advanced function printing (AFP) support was a practical step. Xerox introduced us to the Pitney Bowes product range which enabled us to adapt our output management procedures in line with modern requirements on a step-by-step basis. We no longer process output using only one mainframe application, instead using a document creation system operating at the client/server level. We then combine the output, optimise the postal charges and archive electronically, parallel with the print job. This new software even enables us to feed archived documents into current output data streams."

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Optimising the print flow

The P/I Output Manager solution converts all standard documents (PDL) into the universal dynamic document format (VDD format). This enables P/I Output Enhancement to establish a link between individual pages and pieces of information from the print data – irrespective of the input/output format and the print data resolution. Based on the VDD format, P/I Output Enhancement features a number of functions for processing a document in accordance with a pre-defined script with the aid of, for example, an advanced find and replace function.

P/I Output Enhancement enables users to replace pre-printed stationery with electronic forms and re-convert black and white documents into coloured prints. The software for optimising print streams is primarily characterised by flexibility. Users are able to modify and optimise printable documents without needing to change the underlying business applications. The potential to collate several individual documents from a wide range of input sources into a single dispatch job was critical for VOLKSWOHL BUND.

High standard of cooperation with future prospects

VOLKSWOHL BUND now boasts a centralised output management system for controlling document streams, stack formation and concentration and the centralised and decentralised printing jobs as well as the option of mixing Xerox/PDF and AFP/PDF documents. In addition, printing, archiving and e-mail and fax dispatch jobs run in parallel. "Converting to P/I Output Enhancement was the right move at the right time for us," concludes Bernd Ortmann. "The very competent technical supervision provided by Xerox and Pitney Bowes during the implementation of these services merits a particular mention."

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