

VICTORIA— Improving Productivity and Streamlining Information Delivery with Livelink

"With Livelink, our employees are able to exchange knowledge inside virtual 'rooms' that they have created themselves... We will achieve our ROI in no time."

Knowledge is a decisive competitive advantage in most industries; and the insurance industry is no exception. Easy and efficient access to the entire knowledge of an organization allows people to react faster to market demands and improve the organization's performance. For this reason, VICTORIA-Insurance Group selected Open Text's Livelink® to help manage corporate information and processes.



Insurance companies with a large number of external agents working independently are challenged to provide accurate and secure self-serve access to information and data flow. Using different file types and formats causes disruptions in the flow of information which can lead to disruptions in the flow of work, making time-consuming face-to-face conversations and repeated inquiries both necessary and unavoidable.

The distribution of a monthly newsletter, "Outdoor Staff Information," by the VICTORIA-Insurance Group, demonstrates the challenges associated with inconsistent file types and formats. The newsletter is sent to 10,000 external agents to keep them informed about the core activities of the business, such as changes regarding premiums or services. Besides being costly to distribute, the newsletter incurred various administrative costs, often resulting from the delayed delivery of business critical information. For example, if an agent was notified of changes made to premiums after the changes had become effective, the contracts that were drawn up would then have to be updated to correspond with the latest premiums. As well, the gathering of information for the newsletter is complicated by information being scattered over various file systems in different formats — on the host system, on the file servers, in the messaging system, or typically, in paper files or even in

people's minds. The same is true for the exchange and re-use of experience and know-how — such as the type of argumentation required when trying to win a new customer. Locating vital information and knowledge can become a time-consuming effort; especially if it remains buried somewhere in a network system.

A tall order

VICTORIA-Insurance Group required a central and secure information management system. "We were aware of the fact that the requirements for the system would be very high," said Hans-Gerd Spehl, Intranet project manager at VICTORIA-Insurance Group, describing the project initiation in 1998, when the VICTORIA management team was considering the introduction of an information management solution. Requirements set forth by the Group extended far beyond the functionality that a common document management system could satisfy. In addition, groupware and workflow functionality were needed. Employees wanted a solution that would allow them to search for information, host online discussions, create virtual teams, book meeting rooms and define multi-level workflow processes — all from within the same application.

In addition to the sought after functionality, there were a number of other technical and financial requirements to be considered. In particular,

VICTORIA-Insurance needed a Web-based solution that would allow platform-independent access to protect previous technological investments. As well, the system needed to support decentralized administration of user permissions in order to allow users to supply the needed information, knowledge and know-how to their colleagues, regardless of their position or job title. The system also had to interface with other systems used by the Group, such as Microsoft Exchange and Outlook; support the existing Windows NT platform, SQL servers and Push technologies to keep users informed about tasks or up-to-date information; and scale to support a growing number of users. In short, the solution needed to offer seamless integration with the existing IT architecture and require minimal customization. A final necessity — return on investment for implementing the system should be realized in less than a year.

Standard functionality

For approximately four months, a number of solutions were thoroughly tested by VICTORIA-Insurance's IT department and potential users. The standard functionality of Open Text's collaborative application, Livelink, met the greater majority of the company's tough requirements without warranting further customizations.

Initial stages of the deployment involved designing the solution architecture and installing a test system. The architecture was then optimized for accessibility and performance. VICTORIA-Insurance installed Livelink on five NT-servers with all servers accessing a central Microsoft database containing references to all documents. The documents themselves were stored on the file system, enabling the entire database to be cached in memory and greatly reducing access times. If a source file was requested multiple times, it would already be available using the Livelink Remote Cache™ module.

The positive results obtained during the pilot phase were so satisfactory that further customizations to the system were unnecessary. "Interruptions in the flow of information or disruptions caused by managing various file types and formats, have all but been eliminated. With Livelink, our employees are able to exchange knowledge inside virtual 'rooms' that they have created themselves. An e-mail message containing a URL gives them direct access to the latest newsletter. We will achieve our ROI in no time," said Spehl.

Knowledge portal

Developers at VICTORIA-Insurance have commenced working on the definition of single and multi-level workflow processes to support their core business. These business processes include activities such as booking a meeting room or planning and completing the relocation of entire departments. "In addition to introducing such workflow processes, we would like to implement Open Text's collaborative knowledge portal, myLivelink™, to provide our employees with an environment that they can freely customize and personalize to suit their needs. In this case, the improvement in productivity levels would soon lead us to realizing a significant ROI," said Spehl.

With a contribution of 10.6 billion DM in premiums and a profit of 233 billion DM in 1999, VICTORIA-Versicherungsgruppe is one of Germany's largest insurance companies.

VICTORIA Versicherung AG, part of the VICTORIA-Group, includes third party, accident and motor vehicle insurance, and also runs the various branches of property and transport insurance. The VICTORIA-Group also consists of the following companies:

VICTORIA Lebensversicherung AG,
VICTORIA Krankenversicherung AG,
VICTORIA Rückversicherung AG,
VORSORGE Lebensversicherung AG,
VICTORIA International AG and
D.A.S. (Deutscher Automobilschutz Allgemeine Rechtsschutz-Versicherung AG).

Since 1988, VICTORIA-Group has been part of the ERGO-Versicherungsgruppe AG, Germany's second largest insurance company, which has an annual premium volume of 21 billion DM and employs more than 42,000 people. United under the ERGO umbrella the companies - VICTORIA, D.A.S., Hamburg-Mannheimer-Gesellschaften and DKV, - retain their brand identity and products on the market and are solely responsible for operations. ERGO, the executive/leading holding company, is responsible for the strategic orientation and acts as a mediator on the money market.

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