

The virtual insurance office

Success story



The virtual insurance office

Information management at “VTÜ Versicherungsvermittlung GmbH”

As an international service group of companies, the “TÜV Rheinland Berlin Brandenburg Pfalz” documents the safety and quality of new and existing products. The “TÜV Rheinland Group”, which is the official name of the enterprise, employs a staff of about 7,500 members all around the world. With more than 80 companies in the group, the TÜV Rheinland Group is present in 48 different countries. However, only few people know that the TÜV Rheinland also operates a separate company for insurance broking named VTÜ at their headquarters in Cologne. As a subsidiary of the TÜV group, the VTÜ is in charge of the enterprise’s complete

insurance management. The abbreviation “VTÜ” stands for “Versicherungsvermittlung des Technischen Überwachungsvereins” (meaning the insurance broking of the TÜV). A team of 5 people stands behind this name. Together with Jürgen Prinzen, the Managing Director of VTÜ, this team conveys insurances to all TÜV Rheinland employees and consults interested staff members in questions of their individual insurance coverage. The types of insurances offered ranges from accident and automobile insurances to health insurances and personal retirement provisions which are self-financed by the employees.



TÜVRheinland®
Genau. Richtig.



Working economically and reacting quickly

Of course, a competent consulting and supporting of the TÜV-members in questions of their personal insurance protection requires an efficient way of working with high quality claims. Economical working processes, quick reactions on enquiries and short access

times to all insurance documents are the basic requirements for being able to offer a competent and high-quality service. Since 2003, the team is efficiently supported by the document management and archiving system windream.

Key Facts:

- ✓ System adjustment to the specific needs of smaller offices and departments
- ✓ Rationalization of workflows by paperless document management
- ✓ Increasing productivity by quick access to archived information
- ✓ Structured filing heterogeneous documents

Reality instead of wishful thinking - the paperless office

The vision of a nearly paperless office has become reality for Jürgen Prinzen and his team. The change to digital document management became necessary, after continuously growing paper stacks and a time-intensive search for specific documents had led to enormous delays in the workflow processes. For Jürgen Prinzen, windream as an electronic document management and archiving system is nowadays a product which “enormously increases the professionalism in the administration as a problem solver.”

The variety of formerly used media – correspondences sent via postal services or telefax messages on paper, electronic documents via e-mail – required the use of a modern and digital management tool which allows users a convenient management of all kinds of information. “Since we have decided in favor of windream”, says Jürgen Prinzen, “we work in a real virtual office.”



Specific requirements of smaller companies

According to Jürgen Prinzen, the decisive argument in favor of windream was its specific product focus on the requirements of smaller companies and offices. With the “Standard Business Extension” (SBX) of windream, VTÜ has purchased a product which exactly offers those DMS-functions these companies need. Important in this context: The variety of functions and the flexibility of the system have not been purchased on account of easy handling. The range of functions reaches from basic DMS-tasks like document caption, indexing and retrieval up to the document life-cycle management based on detailed rules. Further on, an efficient rights administration, the versioning, the fulltext extraction for a retrieval according to the contents of documents and the document

history have been integrated. In addition to this, the windream SBX-version also offers the alternative to check out documents stored in the DMS and to protect them from being edited by other users until the documents are checked in again.

A further requirement for the new DMS was the ability to digitize and archive paper-based information automatically and as quickly as possible. The advantageous cost/performance ratio, the ability of an uncomplicated integration into the IT-system architecture of VTÜ and the intuitive handling of the system without any training efforts were further positive criteria which made windream the favorable document management system for VTÜ.

Immediately productive without testing

At the beginning of 2003, after the DMS had been integrated into the existing IT-infrastructure of VTÜ, windream was immediately in productive use. As the system could be integrated into the existing IT-structure seamlessly, VTÜ did not claim a testing phase. Successively, more and more

documents were stored in the DMS directly. A time-intensive training was not required. Due to the system's intuitive handling, the VTÜ-team only attended a short, but precise training session in which the DMS-specific functions were explained.



Document types and folder structures

At the beginning of 2003, after the DMS had been integrated into the existing IT-infrastructure of VTÜ, windream was immediately in productive use. As the system could be integrated into the existing IT-structure seamlessly, VTÜ did not claim a testing phase. Successively, more and more do-

cuments were stored in the DMS directly. A time-intensive training was not required. Due to the system's intuitive handling, the VTÜ-team only attended a short, but precise training session in which the DMS-specific functions were explained.

From newspaper articles to notifications of claims

The types of information archived in windream are quite different and heterogeneous. Generally, all mail entries, all notifications of claims as well as the complete correspondences with insurance companies are captured and managed with windream. Proposals, requests, invoices,

job descriptions, working instructions and protocols are administered, too. Further on, VTÜ also archives important newspaper articles, legal documents, e-mails and telefax messages. Even the administration of customer data with the corresponding customer files is executed with windream.





Scanning documents with windream Imaging

In order to digitize and sort the stacks of different paper-based information, VTÜ has established a separate IT-workstation which has been equipped with a scanner. In combination with this scanner, the company uses windream Imaging, a scan software that has especially been developed for cooperation with windream.

With windream Imaging, users at VTÜ can scan, index and forward incoming paper documents to the document management system windream directly in one single working step. This solution has been designed for network workgroups and thus exactly meets VTÜ's needs.

Archiving e-mails with windream Office Bundle

VTÜ also uses Lotus Notes to manage its e-mail communication. With the so-called Office Bundle, windream GmbH offers an optional module for the DMS, which has especially been designed for Lotus Notes. This solution allows users to archive

e-mails automatically in windream. Therefore, the VTÜ-employees are able to forward messages from a Lotus Notes e-mail application directly into windream and to archive the messages there.

Conclusion: Enormous increase of productivity

By switching from paper archive to electronic document management, a 15 percent increase of efficiency was achieved in the administration of VTÜ. Compared to the number of six employees in the VTÜ GmbH, this means an enormous increase of productivity, but also a real cost saving.

Managing Director Jürgen Prinzen has calculated that – throughout the economization of working processes with windream – a Return on Investment (ROI) was already reached after nine months only, and summarizes: "We do not want to work without windream any more".

Your contact at windream

If you are interested in more detailed information on integrations, solutions or products from the windream world, please do not hesitate to contact us.

Allow yourself to be convinced and decide in favor of windream!

windream GmbH

Wasserstraße 219
44799 Bochum
Germany

☎ +49 234 9734-0

✉ info@windream.com

www.windream.com

