



# Phoenix Case Study

# AXA SunLife

**Following the merger of AXA Equity and Law and SunLife, the newly formed AXA Group achieves consistent, integrated work processing across 700 users, in multiple locations via a flexible process, image and content management solution.**

## Requirements

A product based process, image & content management solution.

A single processing system that integrates disparate systems following a large merger.

A flexible, configurable solution that supports a constantly changing business environment.

### The Phoenix Solution

The m<sup>2</sup> e<sup>2</sup> product set provides the customer service department with a single work processing system across multiple locations. All work is routed and referred to the correct case manager regardless of location, providing improved service and productivity.

m<sup>2</sup> e<sup>2</sup> integrates to existing legacy systems and Siebel providing an XML enquiry service.

Number of Users: 700 across two locations.

Platform: HP Unix

Integration to other applications:

Siebel, IBM, Tandem, Microsoft Word, OCR email and fax

AXA is the second largest insurance and asset management group in the world, operating in 60 countries and managing funds in excess of 781 billion Euro. AXA is one of the UK's largest publicly traded life and pensions companies. AXA Centre, the administrative headquarters is located on the outskirts of Bristol with over 2,200 staff.



## The Business Problem

Prior to the merger of AXA Equity & Law and SunLife, these two companies prided themselves on quality customer service, both companies having received the Five Star IFA Service Award. The merger joined together two locations with disparate systems and different processes. An integrated solution with a common set of processes was required to maintain and enhance customer service. The key objective was to keep its number one position for service delivery. In essence, AXA required a process, image and content management solution that could be used across all locations, functional areas and products. The solution would be required to:

**Easily integrate to multiple legacy systems.**

**Deliver multi-channel service delivery.**

**Allow a flexible work-processing model based on mixtures of case ownership.**

**Handle huge volume of daily throughput.**





**AXA Centre, Bristol**

### **The Solution**

AXA selected Phoenix Technology Group to deliver its m<sup>2</sup>e<sup>2</sup> product set, based on the FileNet Panagon product suite. m<sup>2</sup> e<sup>2</sup> is a component-based product set, using an open systems architecture, it enables large companies to prioritise and to actively manage the distribution and completion of all work (via paper, e-mail, telephone) across all department types. The solution, designed to improve customer service and increase operational efficiency, also includes integration to AXA's letter production system.

Comments Rob Skuse, Systems Development Manager, AXA Sun Life "We calculated that we could make a significant cost saving by reducing the 'paper chase' so the imaging part of m<sup>2</sup> content management capabilities was key. Also, by automating many of our key business processes using e<sup>2</sup> 'workflow' we are reaping significant productivity rewards" adds Skuse.

**"Although we had the capability to build our own workflow solution, we did not want to end up with a system that would limit us in the future. The m<sup>2</sup> e<sup>2</sup> product set is an out-of-the-box solution based on the FileNet Panagon software suite and it exactly fits our requirements"**

**Rob Skuse, Systems Development Manager, AXA Sun Life.**

The following objectives were defined as the as cornerstones for the project:

**Streamlined and standardised business processes across all locations.**

**Tight integration with key policy processing and document generation systems.**

**A single integrated desktop with a uniform view of work regardless of the users location.**

**The removal of much of the paper from the customer service processes.**

**The ability for management to administer processes, rule definitions, service levels and case ownership models.**

**Management capabilities that support in-flight, workload balancing.**

**A phased rollout across all areas with minimum impact.**

### **The Phoenix Implementation Approach**

A substantial part of the solution involved the consolidation of business processes across the two integrated entities. This consolidation added to the scale and complexity of the project and required tight management and control by Phoenix. The initial rollout was split into three phases. Phase One delivered a new business solution for life and individual pensions. In Phase Two, rollout for life servicing was

completed and Phase Three, which incorporated personal pensions servicing "went live" just four months after the completion of Phase Two. There are currently over 700 licenced users.

### **The Benefits of the m<sup>2</sup> e<sup>2</sup> product set**

AXA now has a scalable solution that drives standardised processing of cases across departments and locations. Its flexible organisational model allows business users to manage both team and departmental structures.

AXA now efficiently handles all media types associated with the provision of quality customer service including paper, fax, email, telephone, microfiche and bar-coded documents. m<sup>2</sup> and e<sup>2</sup> provide seamless integration to the once disparate systems across both locations.

An instantaneous and unified view of all relevant customer information is accessible from the desktop regardless of the location of a case manager. Queries are turned around faster and customer service has been significantly improved. Many of the peripheral tasks associated with the handling of paper (e.g searching through dusty files, photocopying, using of paper diaries) have been eliminated. A tidier and more efficient working environment has resulted in improved staff morale. The removal of paper has also eliminated the associated overheads.

Many of what were previously manual tasks have been automated, also case managers and workers no longer spend valuable time inputting data. Productivity has been significantly improved. AXA's chosen processing model is aligned with its departmental and team skill sets. It ensures the more experienced staff focus on the challenging cases and the lesser skilled workers focus on administrative tasks.

Business managers can now view and manage both work-in-progress and in the pipeline, across teams or whole departments. Management information is recorded and reported consistently from all teams. Less time is spent manually allocating resources and more time is devoted to managing and decision making.

The m<sup>2</sup> e<sup>2</sup> product set now forms a cornerstone of the AXA strategic systems architecture and will continue to be used as a platform for growth during 2004 and beyond.

### **m<sup>2</sup> e<sup>2</sup> Product Set**

**"We calculated that we could make a significant cost saving by reducing the 'paper chase' so the imaging and content management solution in m<sup>2</sup> was a key requirement. Also, by automating many of our key business processes using e<sup>2</sup> 'workflow' we are reaping significant productivity rewards.**

**Phoenix provided us with a solution that could be implemented across multiple sites and integrate disparate legacy systems"**

**Rob Skuse, Systems Development Manager, AXA Sun Life.**

### **About Phoenix Technology Group**

Phoenix Technology Group delivers process, content and records management solutions to financial services companies on a fixed cost and fixed timescale basis. Our customers include bluechip companies such as Royal & SunAlliance, Churchill, Winterthur Life, Lloyds TSB, FirstAssist and many more. If you would like to discuss implementing any of the above technologies please contact us.

### **PHOENIX TECHNOLOGY GROUP**

**Phoenix House  
32 - 34 Castle Street  
Dublin 2**

**Tel: + 353 1 6707722  
Fax: + 353 1 6707721**

**web: [www.phoenix.ie](http://www.phoenix.ie)  
email: [solutions@phoenix.ie](mailto:solutions@phoenix.ie)**



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[www.phoenix.ie](http://www.phoenix.ie)