



Phoenix Case Study

Royal & SunAlliance

Phoenix enables faster response times to claims handling & customer queries, eliminating barriers to effective working by removing paper-based processes within Royal & SunAlliance.

R&SA Requirements

- Improve business efficiency
- Increase productivity
- Increase competitive advantage
- Solve storage problem
- Improve staff motivation and morale

Phoenix Solution

The m² e² product set digitally captures all incoming and outgoing correspondence (post, e-mail, fax & web) and distributes work to the appropriate user, allowing complete resource and business process management.

Number of users: 260

Platform:

- Windows NT 4.0
- Microsoft IE 5.0
- Microsoft IIS 4.0

Integration to other applications:

- Citrix
- IBM WebSphere Application Server
- AS/400 Client Access for Windows
- Lotus Notes
- Microsoft Word & Excel.

Royal & SunAlliance (R&SA) was formed in 1996 as a result of the merger of two of Britain's largest insurance companies, Royal Insurance and Sun Alliance. R&SA operates in 130 countries, with a premium income in excess of £10 billion, making it one of the top 10 general insurance companies in the world.



The Business Problem

R&SA (Ireland) business processes and communication channels were primarily paper-based and manually intensive. In order to increase competitiveness, R&SA concluded that an integrated process automation, image and content management solution would improve efficiency and productivity. Staff motivation and morale would also benefit. R&SA chose Phoenix Technology Group for its process, content and image management technology. The technology could handle the high volumes of daily customer transactions, in multiple media formats (fax, mail, e-mail, eform) and could integrate to R&SA's existing network architecture and front and back-end systems.

The following critical success objectives were identified as prerequisites for the solution:

- A minimum productivity increase of 30%**
- Improved customer service**
- Implementation within 6 months**
- Return on investment within two years**
- Significant savings on storage costs**



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John Feighan, Chairman Phoenix Technology Group & Paul Donaldson, CEO, Royal & SunAlliance

The Solution

R&SA chose the m² e² product set from Phoenix, an 'out-of-the-box' web enabled, process, content and image management system. The initial Project Definition phase took 3 weeks. Phoenix examined internal processes and procedures and produced a set of recommendations and a project plan. The Elaboration phase then began, confirming and expanding upon the initial recommendations. Following on from Elaboration, the Customisation phase incorporated all of RSA's specific requirements and customisations.

A mere five months later, the project went live. Change management is always a key part of the Phoenix approach. From the very outset both end-users and administrative staff were involved. The solution, code-named Freeflow by R&SA, is generic, and as such it was easily implemented across the organisation. The m² e² product set is comprised of flexible, standalone building blocks that support all types of organisational structures and processes. It provides a core for e-commerce-related transactions and has proved to be ideal for R&SA. The underlying philosophy of the e² product set is to provide business users with easy-to-use tools to manage and maintain all aspects of their work, from a common desktop.

It provides:

A single view of each customer's details - all relevant documentation at the click of a mouse.

Organisational structure - the tools to set up teams, access profiles and work distribution rules.

Automated business processes - using indexed data, process rules can be set up, including steps within a process or case ownership models.

MIS reports allow managers to measure cost, effort and time taken to complete tasks.

Work Allocation tools allow managers to specify which user receives what type of work, according to skill, priority, etc.

Workload Balancing allows managers to control the distribution of work across users and teams.

All customer information is now accessible from the desktop in a single view. Transaction turnaround times and costs have been reduced. m² and e² interface with R&SA's existing AS/400 mainframe system through IBM's WebSphere, ensuring data integrity.

The benefits

The solution was rolled out in phases, initially to 80 users in new business. Phase Two has seen the solution extended to a further 260 users in a Citrix environment. R&SA are realising numerous benefits in addition to overall increases in productivity levels.

The m² e² product set enables the capture and management of huge volumes of inbound and outbound customer transactions.

Users can now complete many tasks at first point of contact. Queries previously taking over half a day are processed within seconds because the relevant information/policy history is readily available for informed decision making.

"The m² e² product set is a proven solution, it has enabled R&SA to provide a greatly improved service to our customers. It handles multiple communication channels, enabling our customers to communicate with us by standard mail, phone, fax, e-mail or via the web."

Barry Timlin, IT Manager
Royal &SunAlliance

Users are guided through activities via checklists. The appropriate screens/information pop up automatically. No more searching through different systems or dusty files.

The system monitors and controls work. This leaves less room for errors and provides an audit trail for each item.

Users can complete tasks using the following functionality - *Diarise/Pending, Complete, Route to the next process step, Defer, Create new work-item, Send Letters, Add comments, and View the Image/Document Folder*).

Many manual tasks have been automated and increasing volumes of work can now be met without substantial increases in staff.

m² e² provides the capability to configure and control work procedures and distribution. Its flexible organisational model caters for different team and departmental structures, Managers can change the business rules and re-direct work easily, without intervention from the IT function.

Graphically displayed work queues and drag and drop features allow managers

to view and redirect work or assign another user to a work queue. Bottlenecks are avoided and less time is spent collating figures for reports.

The m² e² product set now forms a strategic part of R&SA's business systems architecture. It has allowed the business managers in their departments set-up processes and manage workloads without the intervention of the IT department. The solution allows R&SA to service customers efficiently via all of the communication channels associated with a top class customer service today.

"The imaging and eprocess solution from Phoenix has put R&SA in a position to meet today's competitive challenges and enables us to respond quickly to market changes."

Barry Timlin, IT Manager
Royal &SunAlliance

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 names such as AXA, Churchill, Winterthur Life, Lloyds TSB and many more. If you would like to discuss implementing any of the above technologies please contact us.

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