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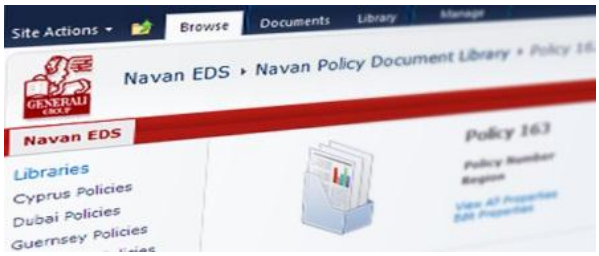
Case Study Generali International



Project Overview

Name

Generali International Limited in Navan, Ireland.

Line of Business

Part of the Generali Group, a global insurance business, Generali International is a provider of sophisticated wealth management solutions to the global market.

Locations

Navan, County Meath, Ireland

Key Challenges

Prior to this project, Generali International kept its policy holder files on hard copy in a large document store. These client records are accessed frequently by customer services staff, often at short notice so they need to be more readily accessible.

C5 Alliance's solution

C5 designed and created an automated retrieval system where documents could be stored and then searched for, as needed, in a SharePoint 2010-based document repository.

The Result

C5 has provided Generali with a dynamic and efficient digital solution which enables the policy holder files to be instantly searched and called to an employee's desktop, meaning they can now reply to client enquiries in seconds. The system is also significantly more robust from a disaster recovery perspective.

The Client

Generali is among the top five large insurance providers in Europe with 85,000 staff and over 70 million clients worldwide. From its offices in Navan, County Meath , Generali International Limited provides sophisticated wealth management and investment planning solutions to the Global market.

Generali International has its head office in Guernsey and is authorised by the Guernsey Financial Services Commission. The company also has offices in Hong Kong Singapore, and Cyprus and is an authorised insurer in Hong Kong.

The Challenges

In order to manage Generali International's relationships with many clients and brokers customer services staff require access to policy holder files and other information on the products and services relating to those clients. Clients can, and often do, telephone or email Generali's employees at any time to discuss the finer points of their agreements and therefore their advisers require constant access to the policy holder files.

These files were kept in a large document store on site for ease of access, however a paper-based system such as this was not ideal for several reasons. Firstly, the store used up valuable office space as the documents could not be stored offsite. Secondly, locating files used up valuable time; when phone calls came in, advisors would need to spend minutes walking to and from the store and locating the correct file before continuing their call. Finally, if the file was already in use and had been removed from the store, the advisors would be unable to continue.

The challenge for C5 was to design a system whereby policies could be accessed from employees' desks quickly and efficiently. The system would also need to conserve space and resources and enable multiple document retrievals to occur simultaneously. In addition, the project required careful management in order to keep the office running smoothly during the transition to the new C5-designed system. One of the biggest challenges was to ensure that the documents were always available to the policy administrators while they were being processed.

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Our Solution

C5 designed and developed an automated retrieval system where policy holder files could be stored and then searched for, as needed, in a SharePoint 2010-based document repository. The system has several key features to ensure efficiency and security not afforded by the previous, paper-based document storage solution.

The first stage in the project was to digitise the existing policy holder file archive. The documents had to be taken offsite to a third party provider for bulk scanning and digital archiving. This had to be carefully scheduled to ensure that at any one time the amount of documents offsite was kept to a minimum and that documents could easily be recalled from the scanning facility if required.

Following the archiving process, the SharePoint interface was rolled out to staff. Customer services staff are now able to search the files from their desktop, calling up information in a matter of seconds. Importantly the system creates an audit trail, enabling Generali to see who has accessed the records and what changes they have made.

C5 also ensured that the solution was optimised for disaster recovery. A digital back up of all the files can now be kept in a secure location, something that was difficult to manage previously.

The new system has also been successfully integrated into employees' workflows with all new correspondence related to the files now scanned or saved digitally into the database directly; a significant improvement in efficiency and security. This system is quick and easy to use, with SharePoint doing the bulk of the filing and subsequent retrieval work automatically.

C5 staff are currently advising Generali on further integration into their existing software and rolling out advanced functionality such as restricting permissions and access to certain individuals. C5's solution is also geared up to work across jurisdictions if required in the future, something that is important to an international business such as Generali.

Client Testimonial

"We were impressed with the level of knowledge and expertise C5 Alliance were able to deploy to the project. They had previous experience of providing a similar system to our head office in Guernsey so we were confident they could meet the brief."

Padraig Jones
Projects Manager
Generali International

C5 have provided us with a software suite that not only improves the speed at which policy holder files can be located, but also improves audit trails and compliance requirements. In the future, it will hopefully support more integrated working between Generali's global network of offices.

The solution that is now in place will benefit our operations in Guernsey and Ireland, and hopefully our other offices around the world including Singapore, Hong Kong and Cyprus.