

CASE STUDY

Die Mobiliar
Versicherungen & Vorsorge

AT A GLANCE

Organization

Swiss Mobiliar

Business Sector

Insurance

Customers

Approx. 1.5 million (2010)

USU Products in Use

USU KnowledgeCenter

Website

www.mobi.ch

Swiss Mobiliar – founded in Bern in 1826 – is the oldest private insurer in Switzerland. Some 1.5 million customers depend on Swiss Mobiliar when it comes to managing risks. The Mobiliar Group, which has around 3,600 employees, received gross premiums of 2.93 billion Swiss francs in 2009. To better access important information in various knowledge sources, since the summer of 2010 the support section of the Group's IT department has relied on the intelligent search technology in USU KnowledgeCenter. An expansion of the system to other company service areas is planned.

Knowledge-based services at Swiss Mobiliar

The Challenges

- Deploy an intelligent search system for need-based access to distributed information sources within an extremely complex, mixed IT environment.
- Replace the old, legacy system with a future-ready standard solution.
- Improve critical business parameters at the service desk, such as by increasing the first-call resolution rate, achieving faster ticket processing and creating a standardized, quality-checked knowledge base.
- Generate added value by deploying knowledge management in other divisions of the Swiss Mobiliar Group.

Project Milestones

- Create a functional specification.
- Select a technology provider through market evaluation, feasibility study and live presentations.
- Start the project and set up a test environment that meets the highest security requirements.
- Implement an access-rights model; install and configure the software and integrate the data sources.
- New system "goes live" in 2010.
- Provide option for step-by-step deployment in other service areas at Swiss Mobiliar.

Why USU was selected

- Long-standing, reliable collaboration with USU's expert partner GlauX Soft
- USU's product line perfectly meets the needs of Swiss Mobiliar
- Best value for money

- High integratability into the existing IT environment
- Good references – successful implementation of similar projects for other customers

Benefits

- Easy acquisition of required information located in various data sources from only one central starting point
- High user acceptance due to an integrated access-rights model, shorter search times, high-quality search results and shorter ticket processing times
- Very positive customer feedback for the IT Service Desk
- Future-readiness ensured by a standard solution with expansion options including a self-service section and diagnostic trees
- Dramatic decreases in introductory instruction and training times



The company headquarters in Bern, Switzerland

Knowledge-intensive service processes

The knowledge resources at Mobiliar IT, with content for support areas and services, had grown greatly over the years and become too dispersed. This situation made it hard for even experienced call center representatives to find relevant solution documents during a call. Especially for new employees, these searches were even more difficult and time-consuming. The deployment of intelligent search technology to improve workplace management was intended to remedy this situation and increase productivity. After evaluating products on the market, the IT management at Swiss Mobiliar decided on USU KnowledgeCenter, which best met the company's requirements and was also preferred by GlauX Soft, its IT system partner.

A very challenging security model

One of the major challenges for the project was to ensure that the knowledge management technology would also support the new security model that had been introduced in the early summer of 2010. Thus, setting up a test environment that fit this model fully and well was mission-critical. For instance, the database had to be in a security zone separate from the server zone and still be readily accessible despite various firewalls. Thanks to the superb collaboration within the project team, the technical adaptations necessary for this complex environment at Swiss Mobiliar proceeded smoothly. This success also included assignment

of access rights for the Group's divisions. Various data sources, including the superseded legacy system with its inventory of solutions, were also integrated and can still be accessed by the new USU technology. Step-by-step, additional quality-checked solution documents have been created, which can also be provided with a validity date whenever necessary. In September 2010, the new system "went live" on schedule in the IT Operations Support department.

A successful ripple effect

The service desk at Swiss Mobiliar processes about 55,000 incident tickets a year. Both managers and call center agents can now have faster access to relevant solutions and prompter handling of inquiries as well as a significant reduction in the time required for introductory training of new employees. In fact, the first feedback – both internal and external – is very positive. Based on this, the management at Swiss Mobiliar is already thinking of new ways to deploy USU technology. In fact, the second-level support in the "Applications" area will soon also be using KnowledgeCenter. Among other things, planning calls for its use in supporting the Mobi24 team at its special call/service center for all Swiss Mobiliar policy holders who are in emergency situations. In this case, the decision-tree module will be added to ensure optimum responses to emergencies, such as vehicle breakdowns. Swiss Mobiliar is currently examining the feasibility of adding the self-service module and its use in the loss/damage-claim area.

"Knowledge and its management is a mission-critical factor in all service areas at Swiss Mobiliar. USU KnowledgeCenter helps us to achieve optimum knowledge transfer when providing service every day."

*Emilio Durante
Team Leader, Service Desk
Swiss Mobiliar*