



Electronic Communication at the Baloise Insurance

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Project Descriptions

Electronic Communication at the Baloise Insurance

The Baloise Insurance company ranks among the largest all-round insurance groups in Switzerland and maintains a leading position in marine as well as in private health insurance. It is one of the most important Swiss companies for life insurance, property, motor vehicle and accident insurance, as almost every second household is covered by one of its policies. Converting over 2'000 existing e-mail users, whilst keeping active all applications which the e-mail system distributed, was no mean feat.

The task faced by the IT team at The Baloise Insurance of replacing the old e-mail system with one which would grow with The Baloise's client/server IT strate-

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gy into the next century was not an easy one. The change from the existing system, which had been in place at The Baloise for 10 years, was to bring with it remote access, Windows features and workgroup support. Also key to the selection was the possibility to interface between the new system and any other e-mail system, to enable seamless communication with external partners.

Performance

Following evaluation of a number of e-mail systems, a multi-platform, multi-lingual system (Totally Automated Office; TAO) was chosen, primarily for the facility to take over existing data from the previous e-mail system. Other keys to the selection were the high price-performance ratio and the ability to grow with the Baloise Insurance's developing client/server IT infrastructure.

The new system will enable the 3'000 employees of the Baloise Insurance to communicate seamlessly, whether they are working on Mainframe or LAN platforms. All employees have full access to the complete range of e-mail and Office services provided by the system which has been implemented in the French, German, Italian and English languages. Messaging, real-time conferencing, diary, calendaring and scheduling facilities and shared directory and bulletin board services are at the disposal of employees round the clock. Using the facility to link into pagers, employees based in-house can remain in constant contact with inspectors at the scene of an accident or any insurance case, to exchange information concerning the type of insurance required.

The Conversion

Unique to this changeover is the conversion of hundreds of thousands of doc-

uments from the existing e-mail data. Using the specifically written conversion software, all employees were able to initiate the conversion of their own data to identically named folders in the new system.

The usual disruptive effects, which an e-mail conversion has on companies, has to a great extent been eliminated at the Baloise Insurance. Most important to the implementers, was to provide each individual user with the facility to convert their data, at a time determined by themselves, to reflect their familiarity with the new e-mail system and cause the least disruption to their business activities. Users noticed little of the changeover to the new system as they converted their data at the touch of a button.

A prerequisite for the implementation of the new system was that no existing systems should be disrupted in order to avoid a loss in business. During implementation, the great importance was evident of a close relationship between implementers and users of the new system to understand user requirements in terms of functionality.

Internal Marketing at The Baloise Insurance

To enable a smooth and fast transition from the old e-mail system, the Baloise Insurance has undertaken extensive internal marketing in the form of tailored training courses. To date over 600 people have attended these workshops, with the system running in French, German and English, which have been tailored to the needs of individual groups of users. Running demos with voice-overs, explaining a selection of such functions as edit document, define surrogate, plan meeting have been used at the workshops which have been attended by employees from all Baloise Insurance branches. Data sheets explaining individual functions are distributed after the workshop, giving users a reference document for after the seminar. In addition, a series of lunchtime demos, inclusive of popcorn, have attracted approximately 200 employees. Specialised intensive courses for the IT department (80-100

people) and product champions lasting about an hour also proved very popular.

The Integration with Existing Systems at The Baloise Insurance

During the conversion, such applications as problem management, network analysis and change control, which were integrated with the existing electronic mail system, continue to run without change, as emulation software is able to intercept and convert calls to the existing mail systems into calls to the new system. The automatic generation of public mailing lists enables everyone within a given cost centre or reporting hierarchy to be mailed according to this grouping. Other mailing lists are built according to hierarchy.

Using existing personnel data, phone directory information is automatically built and stored within the directory. Future changes to the data within the personnel system are detected and automatically applied to this directory. DDE-macros, created in-house at the Baloise Insurance, allow employees working in other word-processing and spreadsheet packages to click on an icon, giving them direct access to their e-mail. The facility to send insurance policies internally is a very important function for the Baloise Insurance as the system retains the original format of the policy.

Using the conferencing function, ongoing training and support have been made much easier. A question and answer board enables users to benefit from the experience of other users. Each time a user query is entered into the conference board, any other user who has already found the solution, may enlighten his/her colleagues. Experience has shown a great saving on technical support resources and promotes even further communication via e-mail. In the initial stages of the implementation, a telephone hotline was in operation for customer queries. This closed down due to lack of demand.

Perspective

Now the first round of users are online, the next task faced by the IT team is to link up a further 2'000 users, including connections to remote users (accident investigators) who will be able to provide details of accidents and respective claims in an instant. They will be given the facility to access the system via paging devices and portable computers. ■

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