



PRÉVOIR – INSURANCE

CENTRALISED SOLUTION FOR UNDERWRITING
PROCESSES AND DOCUMENT MANAGEMENT

SUCCESS STORY
**ENTERPRISE CONTENT
MANAGEMENT**

**“WE ARE VERY HAPPY WITH THE
IMPROVEMENT IN QUALITY, ESPECIALLY
IN TERMS OF CONTROLLING”**

PRÉVOIR Group is a client-centric life insurance company. Its field force of 900 representatives across France provide personal advice to customers in need of assistance. In France, PRÉVOIR brings together 1,350 employees and 355,000 clients. Clients put their trust in the company, which currently reports more than 570,000 contracts, representing more than € 3 million managed assets. Thanks to its financial stability, the group is also active outside France, with two branches in Portugal and Poland respectively.

“It had become very difficult to channel the information from more than 900 sales representatives and all the incoming and outgoing files. Therefore, we are very happy with the improvement in quality, especially in terms of controlling. The solution has brought us substantial genuine benefits in terms of user friendliness compared to before, which is why we aim to implement the OnBase solution across the group.”

Severine Techer
Organisation & Strategic Program Manager, PRÉVOIR

Review the management of clients' sign-up requests – from receipt and virtualisation to final case and contract processing

In 2010, coinciding with the company's 100th anniversary, PRÉVOIR Group decided to review the management of clients' sign-up requests from receipt and virtualisation to final case and contract processing. PRÉVOIR took on board Numerial to assist it with reshaping and modernising its manual processes. The rollout of the pilot project in 2013 yielded instant user benefits, which on completion will automatically manage more than 100,000 documents a month.

Having invited 14 companies to the pitch, PRÉVOIR Group selected the OnBase content management system and Kofax to set up a digitisation and content management project for underwriting processes.

Client benefits

Thanks to OnBase around 100,000 documents are managed more efficiently online every month by the back office team. These developments also benefit sales representatives because it lets them be more responsive to new policy holders.

In view of the quality feedback, the insurance group now intends to extend the solution to all the group's insurance departments. The next department to benefit from OnBase functions in 2016 was Customer Relations, aimed at obtaining a better appreciation of customer satisfaction and the different issues faced by policy holders'.

CHALLENGE

- More than 100,000 documents a month
- Review the management of clients' sign-up requests from receipt and virtualisation to final case and contract processing

SOLUTION

- Integration of OnBase content management system and Kofax to set up a digitisation and content management project for underwriting processes

ADVANTAGES

- Improved case tracking with real time displaying of the current status
- Improved activity controlling
- Faster case processing
- Space saving and better overview of current cases
- Simplified case assignment for administrators
- Time saving by reducing the amount of paper handled by administrators





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