

Swiss Mobiliar's insurance customer's are in safe hands with Convera's RetrievalWare®

In 2001, Swiss Mobiliar Group celebrated its 175th anniversary by presenting its 1.2 million customers with an anniversary gift of CHF 100m from surplus funds. It's an act that is even more remarkable given the turmoil the Swiss financial services market found itself in following deregulation at the end of the 1980s.



Deregulation opened the Swiss financial services market to unprecedented competition at a time when the industry was already in decline. Given the new pressures, it was vital that Swiss Mobiliar, one of Switzerland's top three insurance providers, could differentiate its services in an increasingly crowded market.

The company decided to focus on its main strength: a reputation as a trustworthy and reliable partner that settles customers' claims fairly and promptly. Customer service is at the very heart of Swiss Mobiliar's business: it works with more than 100 largely independent agencies across Switzerland who provide customers with local expertise and a local point of contact. It's a system that works well, with more than 90% of claims settled under the authority of these agencies.

The company's customer service helps it compete with larger organisations, says Hans Romann, Head of Library and Information Services at Swiss Mobiliar. 'We're not the market leader with major resources - our competitive advantage lies with the fact that we stay close to our customers. We operate a very different business model to our competitors; rather than reducing our network and consolidating staff to a handful of main city offices, we prefer to be in the community,' he says.

This kind of decentralised organisation delivers the best customer service and helps Mobiliar maintain close links with local communities, but it also brings challenges. Supporting 4,000 staff across 100 agencies makes it difficult to maintain consistency, particularly when offices range from rural two-man practices to the 1,000-strong team at Mobiliar's Berne Head Office. 'Ensuring the most up-to-date information is available for all staff to handle requests in a speedy and timely manner is a challenge,' continues Romann.

In late 1998, Swiss Mobiliar began looking for an innovative solution to this problem, explains Romann. The company required technology that could manage and process customer claims quickly and efficiently, but which would also be flexible enough to support both the network of local agencies and the Berne central claims department. Initially, Romann's key aim was to enable staff in disparate offices to share knowledge, but he later also realised the benefits of an advanced search and retrieval capability.

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FINANCE

COMPANY INFO

Swiss Mobiliar

COMPANY TYPE >

Mutual Insurance Company

NO. EMPLOYEES >

4,000

REVENUES >

2735 mio CHF (2001)

INDUSTRY >

Insurance, Financial Services

HEAD QUARTERS >

Berne, Switzerland

WEB >

www.mobi.ch

# Swiss Mobiliar

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## ABOUT CONVERA

Convera is a leading provider of mission-critical enterprise search, retrieval and categorization solutions. Convera's RetrievalWare solutions maximize return on investment in vast stores of unstructured information by providing highly scalable, fast, accurate and secure search across more than 200 forms of text, video, image and audio information, in more than 45 languages. More than 750 customers in over 29 countries rely on Convera's search solutions to power a broad range of mission critical applications including enterprise portals, knowledge management, intelligence gathering, profiling, corporate policy compliance, regulatory compliance, customer service and more.



Swiss Mobiliar approached four vendors with its requirements - Verity, Fulcrum, Alta Vista and Convera (then Excalibur Technologies) and decided on a three-month trial of the knowledge and information management system. By the end of the trial, MobiDoc had become an essential part of Swiss Mobiliar's internal 'RedNet' corporate portal, explains Romann: 'It was evident within a short period of time that Convera had not only met our requirements, but exceeded them. The calibre of services personnel was also instrumental in delivering a complete solution to our needs.'

Staff are using MobiDoc and the RedNet portal to access all the relevant customer information needed to process and resolve insurance claims. This information is received daily from a range of internal and external sources - from 8,700 official government regulations in 3 different languages to 1,600 court judgements on previous compensation claims. The system also allows staff to search, find and order online books, press-articles and journals from a central library, and delivers daily updates at 7.30 each morning covering financial services and insurance news from Berne's leading newspaper "Der Bund".

Getting access to timely information can be particularly difficult for Swiss companies - the country has three official business languages and staff may speak Swiss German, French, Italian or English. Searching for previous claims based on a key phrase such as 'whiplash' for example, would require four searches - one for each language. Convera's solution increased accuracy and speed of searches because it was able to search across multiple languages in a single search. Therefore, staff could search claims for 'whiplash' in English and have matching results returned, whether the phrase is in English or one of the other languages.

The system means that Mobiliar's 35 in-house lawyers can concentrate on only the most complicated cases, since they are no longer being pursued by customer service staff for advice on everyday claims. 'The customer service staff can now find this legal advice immediately online,' says Romann. 'The new system means that we don't have to wait for the internal post to deliver information, and cases are sorted out more quickly. Meanwhile the lawyers are able to better focus on finding that vital piece of evidence for a case, which could save the company a million dollar payout'

It's a strategy that is certainly impressing Swiss Mobiliar's customers. In 2000, an independent market researcher found that the company performed better than all its rivals in 16 of 20 key areas of customer service. These areas include the provision of expert advice, a sympathetic attitude, credibility, reliability and value for money. Says Romann: 'Our business is customer satisfaction. My business is information management to support that satisfaction. When claims occur, we keep our promises.'



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