

# IF INSURANCE

An Insurance Company Consolidates Legacy Archives



## BACKGROUND

If P&C Insurance Company Ltd. (If) is a property and casualty insurance company with approximately 3.8 million customers in Sweden, Norway, Finland, Denmark, Estonia, Latvia, Lithuania and Russia. If was formed in 1999 through the merger of the property and casualty insurance operations of Storebrand of Norway and Skandia of Sweden and in 2001 merged with Sampo's property and casualty insurance operations. If is a wholly owned subsidiary of Sampo Plc.

If is the Nordic market leader in private, commercial and industrial insurance. The private business area accounts for approximately half of the insurance premiums and offers household, homeowner, motor and accident insurance, as well as supplementary insurances, such as travel, boat, forest and livestock insurance to over 3 million customers.

As part of a review of IT operating costs, If evaluated the business case for decommissioning legacy customer communications archives used by the Swedish, Norwegian and Finnish business units. These systems were used to store customer correspondence and internal reports related to If's core insurance businesses and are an essential part of day-to-day operations. Documents in the archives are retained for at least 11 years in order to comply with relevant local laws for insurance policy documents.

As the existing systems Documentum and CMOD contained over 150 million documents stored in AFP and PDF formats, it was instrumental for If to find an efficient method for converting and migrating these documents to the target platform. If selected EMC and Crawford Technologies to deliver the conversion solution in cooperation with If's infrastructure services supplier Tieto.

Crawford Technologies' PRO Archiver customer communications archiving solution enables archiving of high volume customer communications which originate as AFP print files. PRO Archiver is the only customer communications archiving solution certified for use with the EMC Documentum platform and provides a range of features for converting, indexing and storing print streams in Documentum.

## At a Glance

### Background:

- With over 3 million customers, If P&C Insurance Company Ltd. (If) is a market leader for private, commercial and industrial insurance in Sweden, Norway, Finland, Denmark, Estonia, Latvia, Lithuania and Russia.
- Multiple customer communications archives contained over 300 million documents in AFP and PDF formats, with interfaces to four customer facing portals for online e-presentation of policy documents and correspondence.

### Objective:

- To consolidate the existing archiving systems into a solution that would deliver the same level of service while reducing the total cost of ownership.

### Solution:

- Crawford Technologies and EMC proposed the EMC Documentum platform with CrawfordTech's PRO Archiver customer communications archiving solution.



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## Solution

PRO Archiver day forward workflows were configured to capture content from a shared file system. The no-burst model in PRO Archiver was chosen to store content with one large batch file and use content-less reference objects for individual documents. This optimizes the storage of content by ensuring that common resources like fonts are only stored once per batch.

Once day forward archiving was operational in July 2015, attention turned to existing archives. If's existing archive had been in operation since 1999 and contained a mix of both customer documents and internal reports from If business units. Metrics around the consolidated archive now include:

- 101 types of document and nearly 150 million records
- AFP and PDF formats representing customer documents and internal reports
- Over 12 TB of content
- Support for over 4,000 internal end users
- Access by up to 2,600,000 customers
- 20 archiving jobs run per day
- An average of 40,000 new documents are added to the archive each day

EMC recommended an open standards approach to archiving. In particular it was proposed that source content be converted to PDF/A for long term archiving. PDF/A was eventually selected by If because it offers an open and long term solution backed by ISO standards.

Content and indexes were extracted from legacy archives for ingestion into EMC Documentum, and the project involved the phased migration of all 80 million documents and their conversion from AFP to PDF/A. The migration took six months to complete and was completed on budget in December 2015.

As part of the migration workflow, individual steps in the process were audited to ensure that all content was being migrated accurately. This ensured that all content was accurately moved to the Documentum system.

## Conclusion

If selected EMC, Crawford Technologies and Tieto to consolidate legacy customer communications archives to EMC Documentum and provide a unified archiving solution. Over 6 months 80 million documents were migrated to EMC Documentum, which enabled If to consolidate legacy archives and reduce costs.

Customer service staff now have instant access to customer communications, which allow them to handle enquiries quicker. And customers have access to policy documents and correspondence through online self-service portals.

## Results

- Storage of content was optimized by using a no burst model, allowing content to be stored in one large batch file with less reference objects for individual documents, ensuring that common resources like fonts were stored only once per batch.
- All 100 million documents were migrated and converted from AFP to PDF/A on-time and within budget.
- Customer service staff now have instant access to customer communications, and customers can continue to use their secure online portals.

## Benefits

- If has reduced operational costs by consolidating all content from CMOD and Documentum into a single Documentum system
- If employees have improved efficiency as they can more easily find documents in a single system
- If has been able to meet their regulatory requirements through a reliable migration of content from their previous disparate archive systems
- If has a solid strategic platform on which to build their future applications
- If customers have a consistent portal to access their documents online

