

ROEDERER DIGITIZES ITS OPERATIONS WITH THEREFORE™ FOR BETTER CUSTOMER SERVICE

"The security and traceability of our customers' data was one of the major reasons for the implementation of ECM."



Pierre Humbert, Deputy General Manager, shares his experience.

What were your motivations for setting up an ECM solution?

Our 48-hour reimbursement commitments could not be met without IT automation. It was essential for us to set up electronic management of our documents and processes.

We have a very large multi-channel inbound flow of documents. Historically, after processing, we archived our clients' documents directly in the services. We decided to centralize part of the operations and set up an internal digitization center associated with an ESAT. This allowed our qualified managers to be relieved of the task of scanning, qualifying and classifying documents so that they could fully concentrate on the management of customer refunds. We have seen a real gain in efficiency and processing time.

Roederer is the leading insurance broker in the Grand Est region and the 13th largest in France with more than 300 employees and 300,000 policyholders. Its commitment to its policyholders and its need for competitiveness make optimal efficiency and responsiveness essential.

They chose Therefore™ in 2018 to cover their Life and Health Insurance needs and now have 150 users, mainly for the management of inbound flows, the electronic archiving of their customer files, as well as the Finance department for processing supplier invoices.

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THEREFORE™ ALLOWS
US TO EVOLVE IN
COMPLETE AUTONOMY
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During periods of peak activity such as September, with everything being digitized upstream, it is now easy to balance the load on our various management sites. Therefore™ allows us to overcome delay issues when the pressure is higher. Today, even with remote working, the workflow allows us to balance the load in a very flexible and secure way.

What was the impact of the lockdowns on your operations ?

Having Therefore™ already in place has allowed us to be more confident in facing the Covid situation. Everything happened very naturally and we were able to activate the missing processing workflows in a few hours after having digitized the document flows that were not yet available.

Thanks to Therefore™, we have also been able to respond to another operational issue linked to Covid and teleworking: KPIs. With Therefore™, management has very good visibility on the processing of customer files, which is essential to fulfilling our commitments. This also allows for more objective management.

How do you address the topic of GDPR at Roederer?

We are in a sector that handles a lot of personal information, especially health information, so the GDPR is at the heart of our concerns. We are also very regularly audited on

this aspect, in particular by our risk-bearing partners within the framework of the management delegations that they grant to us. With regard to the GDPR, the retention period for information can be very variable in our business depending on the nature of the documents and contracts. Managing this with paper documents is very complicated. The implementation of Therefore™ allowed us to define precise retention policies to meet deadlines. The concept of authorizations and access with Therefore™ also made our job easier and made it possible to better secure the departures and arrivals of employees.

“ *Having Therefore™ already in place has allowed us to be more confident in facing the Covid situation.* ”



You have also set up the management of incoming invoices, can you tell us about it?

It just happened. We were very satisfied because we put it all together in less than 2 weeks, which took a thorn out of our side during the first lockdown. Paper invoices are scanned at the scanning center and electronic invoices

are retrieved from a generic box. We quickly expanded the system with purchase orders and PODs to have a complete chain and thus allow validators to have all the supporting documents. We have also implemented dispute management in Therefore™. No one needs to request documents from the Finance department anymore. Paper documents are still kept on paper, but we are in the process of implementing electronic archiving and the concept of a reliable copy for all documents.



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This is very handy as a validator because we have access to the history and old invoices, as well as all the other supporting documents.

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What aspect was decisive in you choosing Therefore™?

It is essential for our competitiveness to remain agile and autonomous with our tools. We are completely autonomous with Therefore™! Our team has also mastered the Therefore™ SDK, allowing extensive integration of Therefore™ with the rest of our Information System for better user ergonomics and better fluidity in our operations.

What is the internal organization for your digitization projects?

There are around 30 people in the IT department, 3 of whom are seconded to the Digitization Division, who are in charge of the Therefore™ application. This team manages the functional aspects and acts as the bridge between the business lines and the IT department in an agile manner. As the workflow settings are easy with Therefore™, it is very efficient.

Do you have any future development plans?

We will continue to deploy new workflows in the company. We will also soon eliminate the paper archives by putting in place the framework to ensure the concept of reliable copy. Finally, we are going to implement new features for 2020, in particular the advanced management of rights and authorizations, the connector for the electronic signature of certain documents, etc.

Thank you to the Roederer company for choosing Therefore™ for its digital transformation and thank you to Pierre Humbert for the time given to this testimony.