

# A large UK employee benefits consultancy

*Enhancing case management and analytics with help from IBM Enterprise Content Management software and Insight 2 Value*

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## Overview

### The need

Managing thousands of employee pensions for companies across the UK is a complex task. The pensions administration division of a large UK employee benefits consultancy wanted to find an easier way for its staff to handle correspondence and case management.

### The solution

Working with Insight 2 Value, this organisation replaced its existing enterprise content management solution with IBM® Case Manager.

### The benefit

Integrates all relevant data and processes into a single interface, making it easier for staff to respond quickly and effectively to clients' requests. Provides enhanced analytics to help managers assess and improve performance. Should deliver full return on investment within 11 months.

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This customer specialises in employee benefits and pensions administration; helping organisations across the UK support their employees, optimise costs and maintain legislative compliance. The company employs more than 500 people in its pensions administration division, part of a larger employee benefits consultancy with offices across the UK.

The pensions administration business is a fully managed service: the company collects pension contributions from its clients' payroll systems, allocates them to the appropriate pension schemes according to members' preferences on how their money should be invested, and calculates and pays the pensions of members after their retirement. One of the most important services it provides is to respond to queries from members about their pensions, which may arrive by email, by postal mail, by phone, or via other channels.

“When people are moving house or changing employer, they need to get in touch with us to update their records,” says the Head of Business Transformation. “And particularly when they're approaching retirement age, they want to know how much their pension will be worth when they retire. As part of our commitment to excellent service, we need to be able to respond quickly and effectively to these and other enquiries.”

## Aiming for a more streamlined process

The customer had already implemented an enterprise content management system that helped to scan, process and store the large volumes of correspondence that the company receives on a daily basis. However, many of the processes that the company was using to handle enquiries from pension scheme members still involved manual steps, or required service teams to switch between multiple systems to gather the information they needed.

Managers also wanted to find a better way to monitor the performance of the service teams, but it was difficult to extract and analyse management information from the existing system.



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## Solution components

### Software

- IBM® Case Manager

### IBM Business Partner

- Insight 2 Value
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“Although we had an underlying platform for enterprise content management, there were many areas where we needed more functionality – especially in terms of usability, process automation and reporting,” explains the Head of Business Transformation. “Developing these capabilities ourselves would have been a difficult and expensive process. Moreover, since the whole business was in the middle of a major transformation programme, we needed to get these core processes sorted out as quickly as possible in order to avoid delays to the rest of the programme. Bespoke development just wasn’t a viable option.”

## Finding the right partner

Insight 2 Value, an IBM Business Partner that specialises in case management and content analytics were engaged and recommended IBM® Case Manager.

“IBM Case Manager ticked all the boxes – we saw that it could provide almost everything we wanted out of the box,” says the Head of Business Transformation. “Our only concern was that it was a relatively new product at the time, so we asked Insight 2 Value to provide a proof of concept to make sure it would meet our needs. We spent three weeks testing it, and our users were fully involved in configuring the software to support our processes. At the end of that time, we made a unanimous decision to go ahead with a full implementation.”

## Delivering results fast

Insight 2 Value upgraded the existing IBM P8 platform to the latest version, and then installed and configured IBM Case Manager on top. The implementation was completed within just three months.

“The project went exceptionally well, which is testament to the flexibility of the software itself, the expertise of Insight 2 Value, and the dedication of our in-house team,” comments the Head of Business Transformation.

Phil Hagen, Director at Insight 2 Value, adds: “The customer’s approach to project management was excellent – they ensured that representatives from all their different teams were involved in the project design and user training, which helped our combined team deliver a solution that met all the requirements within a very tight deadline.”

The customer was similarly positive about the project: “We’ve built a solid relationship with Insight 2 Value, and since the implementation, we have also been impressed with the support from IBM. As an early adopter of Case Manager, we have a lot of ideas for the future development of the product, and it’s great to see that IBM is really taking our feedback on board. A lot of large vendors don’t seem to listen to their customers, but IBM has been very responsive.”

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— Head of Business Transformation, a large UK employee benefits consultancy

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### **Adding new functionalities**

As part of the project, the Insight 2 Value team developed a widget for the Case Manager interface that allows users to interact with the customer’s pension administration system – so there is no longer any need for users to switch between systems.

“We now have a single screen that displays the entire case history for each member, as well as providing direct access to their records in our pensions system, so our service teams have all the information they need at their fingertips,” says the Head of Business Transformation. “The widget system in Case Manager is great because it makes it so easy to deliver new features without making changes to the software itself.”

### **Flexible workflow management**

The new solution also provides a much more robust and flexible method of managing workflows, which has helped automate and streamline the case management processes.

For example, when a member writes a letter asking about the value of their pension, the correspondence is scanned and stored in the IBM P8 system, and this automatically triggers the creation of a new case in Case Manager. The case is then routed to the appropriate regional service team, and added to the team’s queue. As soon as a user clicks on the case, the solution opens a screen that displays all the relevant information.

To generate an estimate of the pension’s final value, the user simply clicks a button in the Pensions Administration System widget. They can then use a standard template to reply to the member’s letter, and insert the appropriate figures. Next, the reply is routed to a second person for checking, and once approved it is printed and mailed to the member. The solution also automatically keeps a copy of all outgoing correspondence, which is stored in the appropriate case file.

“From the moment the member’s letter is scanned into the system until the moment our reply gets printed, the whole process is completely digitised,” says the customer. “There is no paperwork and everything runs much more smoothly, even if staff are working in different locations. The solution is web-based, so we can even log into it from home if necessary.”

### **Unlocking new insights**

The other major advantage of the Case Manager solution is the new insight it provides into case management performance. Harnessing IBM Cognos® Real Time Monitor technology, the solution enables managers and team leaders to track each team’s case management performance via live dashboards. It can also output reports in spreadsheet format for more in-depth analysis, helping the company identify delays, bottlenecks and other opportunities for process optimisation.

“One of the real wins for us has been the ability to create dashboards for our clients, so that they can assess our performance in meeting the service-level agreements,” says the Head of Business Transformation. “This has proven to be an extremely popular feature, as it helps us demonstrate the value we’re providing and gives our clients peace of mind.”

He concludes: “We’re delighted that we have been able to deliver such a successful project within such tight budget and time constraints, and we’re certain that by streamlining our case management processes, we will be able to handle enquiries from members much more cost-efficiently. As a result, we expect to achieve a full return on our investment within just 11 months.”

## About Insight 2 Value

Insight 2 Value provides enterprise content management, document management and business process management solutions to large and small organisations in the UK. The company’s focus is to ensure that solutions which deliver significant, measurable benefits are available to its customers at exceptional value points. Insight 2 Value tailors best-of-breed technology to specific market requirements, and can provide pre-configured solution templates which are designed to work without undue disruption or a need to learn a whole new “technology language”.

To learn more about Insight 2 Value, email: [enquiries@insight2value.co.uk](mailto:enquiries@insight2value.co.uk) or visit: [www.insight2value.co.uk](http://www.insight2value.co.uk)



## For more information

To learn more about IBM Enterprise Content Management solutions, contact your IBM sales representative or visit: [ibm.com/software/ecm](http://ibm.com/software/ecm)



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