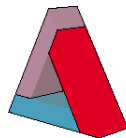


**hp** success story



**HELVETIA  
PATRIA**



Building a state-of-the-art  
e-Business platform for the  
Helvetia Patria Group

With Hewlett-Packard as its consulting and integration partner, the internationally active Helvetia Patria Group is in the process of building a state-of-the-art e-Business platform. Brokers, banks and independent agents are now able to use an attractive Internet channel to access the products of the Helvetia Patria Group. Beyond this, the new Business-to-Business solution provides a user-friendly information system containing data on clients, policies and claims.

Helvetia Patria is an international all-branch insurance group, with subsidiaries, branches and business interests in central and southern Europe. The Group was formed from the merger of Helvetia (a non-life insurer) and Patria Life Insurance. The St. Gallen-based company employs around 5000 staff and achieved gross premium income of CHF 4.6 billion in 2001. In Switzerland, Helvetia Patria's 30 offices provide comprehensive insurance and financial service support for private individuals and companies either alone or together with local partners

such as Helsana, Raiffeisen, Vontobel and the cantonal banks.

### **The need for innovation**

As part of a strategic situation overview of the Helvetia Patria Group held in 1999, there was a loud call for innovation. It emerged that the greatest potential for this was in the e-Business area, and the Group decided to make a central e-Business infrastructure available for its country organizations in Switzerland, Germany, Spain, Austria, Italy and France. The key to achieving maximum utility would be through the central provision of the infrastructure and generic processes, as well as the centralized development of standard components. Each company would take up a local version of the solution, or develop country-specific solutions on the basis of the existing infrastructure. On cost grounds, it made no sense to set up separate infrastructures for each country.

### **Required: a group-wide platform and know-how development within the organization**

The goal of Helvetia Patria was to build a Group-wide e-Business platform within Europe and to provide the country branches with business-specific e-Insurance business modules. The interactive solution for the countries would be managed centrally by the Group. With this new infrastructure, Helvetia Patria aimed to achieve a significant technological leap forward, as well as to offer its employees an innovative and motivating work environment. A key component would be the buy-in of all the countries, as this project would be one of the first operational initiatives with major importance for the various country operations. Beyond this, they sought to bring it to market as soon as possible, through provision of a comprehensive staff training program. In addition, development needed to be possible

in-house, since Helvetia Patria wanted to maintain its independence and build the necessary know-how within the company.

### **Selection of Hewlett-Packard**

Running parallel to these strategic processes was the evaluation of a suitable consulting and integration partner. There were ten suppliers on the final shortlist, each of which was presented by Helvetia Patria with a business case to solve. Based on the results, the shortlist was reduced to two providers – one of which was Hewlett-Packard, which was finally selected.



The reason for Hewlett-Packard's selection is explained by Didier Beck, Chief Technology Officer of the eCenter of the Helvetia Patria Group: "We liked the fact that HP offered a step-by-step solution, so that they could guarantee quick time to market. Our HP contacts were competent, trustworthy, and inspired our confidence, and they were obviously used to working in an international environment. In addition, they had a comprehensive knowledge of insurance. We were convinced by the arguments for the HP-Nimius platform and the basic solution. Not

least, the references from Bank Vontobel and the Raiffeisen banks encouraged management make the decision to go with HP, particularly as we had never worked with HP before."

### **Development of an eCenter in Zurich**

In order to better coordinate their international activities, Helvetia Patria opened a competence and coordination center – the so-called eCenter – in Zurich. The eCenter is responsible for planning and coordination of the e-Business project, assists with its realization, and develops rules and procedures for working with the new technologies within the individual country operations. Thanks to this central organization, it is possible to draw on past experience and ensure that this flows immediately into all subsequent projects. Beyond this, the eCenter is responsible for the creation and operation of the Europe-wide infrastructure.

### **Efficient project development**

In order to test the internationality, processes, architecture and finally, the solution itself, Helvetia Patria and HP set up a pilot installation. The first test phase demonstrated the potential of the chosen architecture. The prototype also tested the technical components. In particular, the integration mechanisms were extremely important, since the Helvetia Patria Group had a very heterogeneous system landscape.

Developers from all the country organizations were trained at the eCenter in Zurich, where the first know-how transfers took place. Dr. Christoph Niquille, head of the eCenter, recalls: "People were very enthusiastic and we were able to start working actively to convince them about the project. At the start of 2001 we invited all the country CIOs to a workshop that was a great success." With the completion of a training concept and course structure, and the cooperation of IT specialists

from the country organizations in international projects, Helvetia Patria was able to create the necessary technical knowledge and ensure broad support.

### **Making life easier for brokers and agents**

The first project, which developed in parallel the e-Platform as well as the processes and standards for the eCenter, was the country-specific accounting and simplified establishment of index-linked life insurance offers via the Internet. This involved the integration of existing, usually host-based accounting modules into the e-Platform application, in order to profit from existing developments and achievements. Thanks to the new Business-to-Business solution, insurance brokers and agents now have access via the Internet to all Helvetia Patria's products. Furthermore, they can access information about clients, policies and claims. Both this information system and the product catalogue are now being continually added to and enhanced with additional information.

### **Challenges for IT specialists**

The individual companies as well as the Group place different demands on the new infrastructure. In order not to disadvantage the smaller countries, it was necessary to find a common denominator. In addition, the product structures were not the same in all countries. These facts required a flexible product catalogue of a type that was not available commercially with all the desired functionalities. As a result, the IT specialists had to develop a suitable module based on the international ACORD and VAA standards. Today the all-branch product catalogue is fully available and enjoys wide acceptance; and although the work needed to achieve this was initially underestimated, everyone agrees that it has been worth it. Comprehensive resources also had to be invested to broaden the Nimius solution from a banking to an

insurance solution.

Last but not least, a great deal of experience was collected in regard to knowledge sharing, which forms a critical component of such projects. Today, the employees have an outstanding level of training and are able to work independently at a very high level.

### **Demanding tasks for Hewlett-Packard ...**

HP supported the Helvetia Patria Group both in the creation of the eCenter and the establishment of the e-Platform, as well as in the realization of the first projects. These included the application concept, training of Helvetia Patria staff, coaching and implementation. In addition, HP was responsible for hardware, monitoring, the establishment of high security requirements, and for the Nimius E3 platform with ODS (Operational Data Store). An important further task was the introduction of Helvetia Patria employees to the newest Internet technologies, so that these could be used in future independent follow-up projects.

**Dr. Christoph Niquille is satisfied with what has been achieved: "HP has delivered excellent value, and HP's insurance knowledge helped enormously to drive the solution. The country organizations have also acknowledged this. Not least, we give top marks to HP for their step-by-step concept and the consequent early time to market. Plus – and this is also very important – we always have enjoyed an excellent working relationship."**

### **... professionally performed**

So it was no wonder that the Helvetia Patria Group chose HP's consulting and integration services and outsourced the hosting of their entire e-Business infrastructure, including both the platform and applications, to HP. This means that not only stability and

**Didier Beck adds: "There was very intensive partner-like cooperation between HP and the country organizations. The countries are enthusiastic about the Nimius solution and are happy to work with it. Know-how transfer is progressing well. This is certainly helped by the fact that the cultures of both companies are a good fit. In addition, HP applied just the right amount of pressure to ensure that the project progressed positively."**

performance are guaranteed, but also that a professional 24 x 7 operation for all countries is secured. (See the separate flyer for the outsourcing user story.)

### **Practical, well-accepted solutions**

Helvetia Patria now has a highly flexible, multi-channel e-Insurance platform, which optimally protects its previous investments in its operating system. Helvetia Patria's employees have fully accepted the new solution and are highly motivated to work with the new technology and to profit from the competence of HP's people. As before, application support remains in Zurich, and here also, there are no problems with acceptance, since employees from the country organizations were able to develop excellent relationships with colleagues in Zurich during their training.

### **Future plans**

The goal of the Helvetia Patria Group is to extend the solution further and to link it with the back-end system, in order to enable online requests for client information, policies and claims, etc. The development of a solution to enable the completion of on-line insurance contracts is also under discussion. They are also considering developing sales support CRM (Customer Relationship Management) tools, and broadening the existing proposal system from a Business-to-Business to a Business-to-Customer solution.

## hp success story

### Client overview:



**Branche:** Insurance

**Name:** Helvetia Patria Insurance

**Head Office:** St. Gallen, Switzerland

**Founded:** 1858

**URL:** [www.helvetiapatria.com](http://www.helvetiapatria.com)



You can find further information about the advantages Hewlett-Packard can offer your company from your local HP representative or at:

**<http://www.hp.com>**

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