



### Business challenge

As an insurer, Ilmarinen needs to store vital policy documents securely for more than 50 years – but it also needs to keep this information easily accessible for use in day-to-day business processes.

### Transformation

Enterprise content management helps the company instantly access data from its archives and other active sources, providing a seamless, unified user experience.

#### Business benefits:

### Boosts

productivity and trust with instant access to documents via a unified interface

### Simplifies

compliance with legal requirements for long-term document retention

### Saves

costs by eliminating physical document storage and paper-based processes

# Ilmarinen

## Boosts productivity and client satisfaction with instant access to pension and investment documents

Ilmarinen’s task is to ensure that over 900,000 people employed in Finland receive the pension they have earned from their employment. Backed by 550 experts in the field, the company helps its clients succeed, and helps their employees enjoy their work and spend a healthy and happy retirement.

*“We can access any content instantly, archived or active – so we always have the right documents.”*

Kirsi Lahtinen, Project Manager, Ilmarinen

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## Supporting the business with digital archiving

The pensions and investments sector is a document-heavy business. The term of an investment might be 20 years, while the management and payment of a pension might encompass 70 years or more – and over that time, hundreds of documents, letters, emails and other correspondence may need to be recorded and managed.

As insurers become more focused on winning and retaining customer loyalty, it is vital to ensure that employees are able to navigate through this mass of documentation efficiently. To gain new insight into the right actions and offers for each customer, you need to build a 360-degree view of that individual from their document history.

At the same time, from a legal perspective, all these documents need to be stored securely – often for many years after the pension or investment has ceased to be active. For example, in Finland, where Ilmarinen manages pensions for over 900,000 people, the Finnish Employees Pensions Act (TyEL 218) requires insurers to retain pension documentation for the policyholder's lifetime plus five years, and documents related to appeals must be kept for a minimum of 50 years.



Kirsi Lahtinen, Project Manager at Ilmarinen, explains: “Our company's productivity and customer service depend on our ability to access information about each customer's pensions quickly and easily. Yet our reputation with our customers and regulators depends on our ability to keep these important documents safe.

“Our existing archives were stored in various different ways – some documents were digitized, but many were still stored on paper. It met the legal requirements, but when we needed a document, we actually had to go down to the vault to retrieve it. As part of ongoing strategy to automate our most important business processes, we wanted to make the whole archive instantly accessible from within our existing SharePoint environment. We needed to support SharePoint with strong content management and archiving capabilities, and we saw that IBM enterprise content management platform could provide exactly that.”

## Augmenting SharePoint with enterprise content management

Ilmarinen uses Microsoft SharePoint to manage and collaborate on active documents. The company decided to integrate SharePoint with a new enterprise content management platform that would provide seamless access to content (whether that content sits in a collaboration environment or in a digital archive), and also potentially act as a shared content services platform for unifying access to content held in other systems in the future.

Working with Elinar, an IBM Business Partner that specializes in enterprise content management solutions for the Finnish insurance sector, the Ilmarinen team used IBM® Content Navigator to provide an intuitive user interface that plugs into SharePoint. The new interface empowers users to commit, find, manage and retrieve documents from both active repositories and a long-term archive which is built on the IBM FileNet® Content Manager and Records Management platform. The solution is known as “Holvi” – the Finnish word for “vault”.

Kirsi Lahtinen says: “Elinar’s proposal was the best on almost every level, in terms of cost and competencies, and during the project itself they were very flexible. While the project was in progress, we were also working on a major process automation initiative, which made the implementation of Holvi much more complex. But Elinar and our in-house team did an excellent job of adapting to the changing requirements.

“Even though it is built on IBM technologies, we made Holvi look exactly like SharePoint, so our users don’t even notice that they are using a different system. More importantly, users trust they have the most current and most complete view in any given situation. Users know their documents are in a safe place. The feel of trust boosts employee productivity, and that is reflected in client satisfaction.”

She adds: “Holvi is more than just a way to access content: we have also embedded workflows to handle most of the complex parts of the archiving process automatically. Users don’t need to worry about inputting the right metadata when they place a document in the archive. As a result, user adoption has been very smooth.”

## Boosting productivity

Today, document retrieval is a significantly more efficient process for Ilmarinen. Instead of going downstairs to the vault, users can simply click on Holvi within their SharePoint browser window, and click through to the files they need. As a result, Ilmarinen’s users have quickly come to trust Holvi as a fast, secure and reliable source of information, and it has become critical for many of the company’s core business processes.

“Each user can only see the documents that they are authorized to work with, and each process only has access to the relevant files,” says Kirsi Lahtinen. “This makes it easy for users to find and identify the documents they need, without navigating through the entire archive. It’s a seamless experience.”

## Achieving full compliance

Thanks to the new solution, Ilmarinen can now be confident of fulfilling its legal obligations around long-term document retention. Kirsi Lahtinen comments: “Holvi’s built-in file planning capabilities mean that each document is stored in the right place, with the correct retention dates. This reduces effort for our users, and gives us confidence that our documents will be stored in full compliance with all laws and regulations – both now and many years down the line.”

## Moving towards greater customer-centricity

The solution is also helping to improve customer service. For example, when a client asks a question, the Ilmarinen team has the relevant information at its fingertips, and can respond straight away – with confidence that they have the most current content and the latest versions of all documents.

“Enterprise content management makes it easier for us to gain a fuller picture of our history and relationships with each customer – which means we can serve them faster and more effectively,” says Kirsi Lahtinen. “Instant access to documents will also support the work we are doing on other important initiatives, such as streamlining our claims handling and dispute resolution processes.

“The enterprise content management foundation we have built acts as a shared content services platform, on top of which we can build other content-related applications in the future. Repeatable shared content services such as archival, retention, content workflow and unified user experience help us increase our agility in serving our clients faster and with greater confidence.”

## Eliminating paperwork and saving costs

The solution has already enabled significant savings by enabling Ilmarinen to dispose of its physical archive – eliminating the costs of printing and storing paper documents, and of transporting copies off-site to another secure location.

Ari Juntunen, CTO of Elinar, comments: “We work with many insurance companies: some are still struggling with paper archives, and very few are able to access documents in the seamless way that Ilmarinen has achieved. By building this solution, we think Ilmarinen is moving ahead of the curve in Finland.”

Kirsi Lahtinen concludes: “Today, it is hard to imagine life without enterprise content management. We would certainly need to hire more people to achieve the same level of productivity. And as we work to automate more of our business processes, the ability to bring content together and analyze it quickly and seamlessly will play an ever more crucial role.”

## Solution components

- IBM® FileNet® Content Manager with IBM Content Navigator
- IBM Enterprise Records
- IBM Content Collector for File Systems
- IBM Content Collector for Microsoft SharePoint
- IBM Content Classification
- IBM Business Partner Elinar

### Take the next step

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