



CASE HANDLING THE SMART WAY

W&W Informatik and CENIT optimize case processing at Wüstenrot

Wüstenrot Bausparkasse [Savings & Loan] AG, a subsidiary of W&W Group (W&W AG) relies on ultra-modern automation for its case processing. For years, incoming documents have been handled via electronic inboxes. To steadily optimize customer support and service, W&W strives to continually improve the underlying processes.

Recently, an expansion update was installed to realize a number of improvement wishes on the part of Wüstenrot's IT department. The changes have accelerated case intake, optimized document routing, and enabled more comprehensive monitoring.

► DOCUMENT MANAGEMENT AT WÜSTENROT – STATUS QUO

At W&W, incoming documents are scanned and indexed using a largely automatic process. The documents are also linked to metadata such as customer or contract number and the document type, from which the case type can then be derived. Next, a case file is created based on the case type and the associated documents. In a further step, the case files are augmented by data extracted from the company's various systems.

Case handlers deal with case files from their own inbox and from the subject-based inboxes for which they are responsible. When processing cases from the subject-based inbox, the case handler automatically receives case files in order of assigned priority.

► THE LATEST IMPROVEMENTS

In collaboration with CENIT, the W&W project team expanded the mechanisms governing the automated case file management and mapped additional tech-

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Karl Rothacker
responsible Group Leader at W&W Informatik

The information package bundled within the case file is then transferred to the business rules management system IBM Websphere ILOG JRules. The job of ILOG JRules is to use the rules established by the IT department to determine the correct target inbox for the case file. Based on these rule sets, the entire case file is forwarded either to a subject-based inbox or to a specific case handler's personal inbox.

nical requirements with respect to the automated rules. Routing within the ILOG was optimized, and a case history was introduced. Wüstenrot staff can see via the portal what contract or customer changes have been made as a result of what case activity, and what documents (inbox and outbox) belong to a case file.

Another innovation is data enhancement within the inbox: W&W's systems now include more customer information in the



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data package appended to the case file in the inbox. "That lets us optimize and individualize the way we forward incoming cases", says Karl Rothacker, responsible Group Leader at W&W Informatik.

The statistics output by the IBM WebSphere Business Monitor was enhanced as well. Thanks to the additional information, W&W was able to identify workload spikes and better distribute available capacities. "Our monitoring relies on these improved statistical and control functions to produce fine-grained customer evaluations and reports", explains Karl Rothacker.

The expansion update went productive in August 2010. W&W wants to keep developing the system further and is already planning the next optimization steps.

► SOLUTION COMPONENTS:

- IBM WebSphere Portal
- IBM WebSphere Process Server
- IBM WebSphere Business Monitor
- ILOG JRules

► BENEFITS OF THE EXPANSION UPDATE:

- Implementation of new, more precise rules in automated case processing
- Addition of personal inboxes to the inbox system
- Data enhancement within the inbox: greater transparency thanks to a broader customer information
- Improved monitoring for increased work efficiency

► ABOUT W&W INFORMATIK GMBH:

W&W Informatik GmbH is the exclusive IT service provider for Wüstenrot & Württembergische Group. With about 850 staff, the enterprise develops and operates all IT applications within W&W Group and is responsible for networks, decentralized systems, architectures and computing centers.

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Wüstenrot & Württembergische Group is the "Provision Specialist" for the four components of modern provision planning: safeguards, protection from risk, home ownership, and asset accumulation in all walks of life. The publicly owned corporation based in Stuttgart combines home loan banking and insurance as two equally strong pillars. W&W Group has established itself as the largest and most customer-rich independent financial service provider in the state of Baden-Württemberg.



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