

# Bayerische Versorgungskammer



With Perceptive Document Composition, Bayerische Versorgungskammer (BVK) has consolidated its documents into convenient bundles and created standardized, reusable document templates that users can easily access and personalize. Color elements and logos have improved BVK's branding. Perceptive Document Composition is saving more than €150,000 each year.

## Challenge

BVK's 1,100 employees create six million customer correspondence documents and contracts (15 million pages) each year. Though the company's existing mainframe-based customer relationship management (CRM) system was fast, it was also outdated, did not integrate with content repositories and could not be expanded. Due to the existing application's limited authoring and search functions, it was easier to create documents one by one than to find existing ones to repurpose.

In addition, some of BVK's document templates were 25 years old and featured no color or customized graphics. This made it difficult to enforce branding standards, and made it difficult for users to create the customer-facing documents they needed in an efficient manner. Once document packets were physically printed, there was no way to archive digital copies, and printing was done sporadically in a way that was not cost-effective.

## Solution

To solve these challenges, BVK implemented Perceptive Document Composition, a sophisticated document output management (DOM) suite, alongside a new CRM application. Deployed in 10 business units, including those serving architects, lawyers, and civil servants, Perceptive Document Composition dynamically generates all communication data for yearly benefit statements, monthly payments for beneficiaries, contracts for new members (individuals and companies) and response letters to member inquiries.

## Enhancing customer service & satisfaction

To offer even greater value, Perceptive Document Composition seamlessly integrated with BVK's FUTURA CRM system (which replaced the outdated mainframe application) and the enterprise content management (ECM) solution. For document authoring, the Perceptive Document Composition pulls customer information from the appropriate CRM record and supporting applications, and uses it to pre-populate the documents in the correspondence packet.

"This creates a seamless flow from generation to secured records of all important communication," explains Wolfgang Denz, Project Leader in BVK's IT Operations department.

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## Meet Bayerische Versorgungskammer

Based in Munich, Germany, BVK is the largest provider of retirement and disability products and services in the Bavaria region, where all professionals (such as doctors, lawyers and pharmacists) must be registered with BVK. In 2008, BVK received contributions in excess of 3.4 billion Euros, paid benefits of 2.3 billion Euros.

- ▶ **Location:** Bavaria, Germany
- ▶ **Staff:** 1,100
- ▶ **Focus:** Retirement and disability services

**Products in use:** Perceptive Document Composition

*“With Perceptive Document Composition we generate both standardized and highly personalized documents – 15 million pages for 1.8 million contracts. It gives us a single, easy to adapt system that has transformed document delivery for the modern age.”*

**Günter Zuchtriegel**

IT Applications Manager  
Bayerische Versorgungskammer

## Results

### Simplicity replaces complexity

With Perceptive Document Composition, BVK conducted a comprehensive audit of its customer-focused documents, and identified 7,000 individual items. When using the old system, updating existing documents was almost impossible, and creating new ones required an IT programmer. Perceptive Document Composition has replaced this complexity with an intuitive interface, which allows document designers to create a template just once in the convenient and familiar Microsoft Word environment and then apply it to other pages as needed, instead of starting from scratch each time.

Template elements (such as terms and conditions) can be applied to contracts, end-of-year statements and virtually any document type that requires consistency. The document designer also sets rules for graphics, header and footer branding and other elements imported from the FUTURA application.

### Speeding turnaround, reducing effort

Perceptive Document Composition's intuitive text editor and template creation tools have enabled the company to group content into 1,600 bundles customized to individual customer needs. Users select the individual document or bundle they need, and print it with a single click. In this way, the created documents are standardized and also personalized, better enabling users to tailor output to their customers.

Previously, when a customer called BVK requesting printed information, providing this involved a complex and time-consuming process of getting information from multiple applications. Now, Perceptive Document Composition displays a pre-defined template, which the appropriate staff member customizes by choosing several text elements from a library and then dragging and dropping them in seconds. Finally, the user can personalize the letter, and preview it in Microsoft Word before sending. This is completed without leaving the CRM system.

“With Perceptive Document Composition we generate both standardized and highly personalized documents – 15 million pages for 1.8 million contracts,” said Günter Zuchtriegel, IT Applications Manager at BVK. “It gives us a single, easy to adapt system that has transformed document delivery for the modern age.”

### Saving the environment and €150,000 annually

BVK prints an average of 700,000 pages a month to send to its members, which used to require a seemingly never-ending series of small print jobs. At peak times, such as for end-of-year statements, this demand rises to four million pages. The batch printing capabilities of Perceptive Document Composition enable BVK to consolidate this high volume output into less frequent and more efficient scheduled print jobs, delivering rapid return on investment.

“We optimize the output by printing once a week and combining documents to one address into one envelope,” Denz said. “This has resulted in a 10-15% saving, which is €150,000 per year.”

In addition to physically printing batches, Perceptive Document Composition sends document images into BVK's electronic content repository, and auto-indexes each one. This unified approach creates a seamless, end-to-end document creation, output and archiving system and makes customer-focused content instantly available to respond to a customer inquiry or for auditing.

Another benefit that Perceptive Document Composition delivers is the ability to track document creation and output statistics for the 10 divisions that use the DOM suite. With powerful reporting tools, BVK managers have a snapshot of current production and can track long-term trends and productivity, empowering them to further optimize business performance.

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**Wolfgang Denz**

Project Leader  
Bayerische Versorgungskammer

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