

Case Study



Company Profile

The GVB Group stands for expertise in all aspects of securing and insuring buildings. The company, headquartered in Ittigen (BE), consists of Gebäudeversicherung Bern (GVB) and its subsidiaries GVB Privatversicherungen AG, GVB Services AG and Safet Swiss AG.

Technologies



Power Apps



Power Automate

GVB: Automated processes for customers and employees

Challenge

- Automate incoming customer requests
- Replace outdated process tool with a modern solution
- Being able to map, create and add workflows independently in the future

Solution

- Low-code/no-code platform „Power Platform“ from Microsoft and its modules Power Automate and Power App in particular
- Interface to SAP for live data query
- Overview of all new process steps supplemented in the customer's existing Confluence

Benefit

- User-friendly environment
- High degree of automation and thus high time efficiency
- Clean records of the individual process steps and thus analyses as well as manual intervention possible
- Easy integration into the Microsoft world of GVB

Gebäudeversicherung Bern (GVB) aimed to simplify selected processes on both the customer and employee side. „We wanted to establish modern and sustainable processes, so we started with the software and said goodbye of an outdated process tool,“ said Roberto Liviero, Solution Architect at GVB, explaining the starting point of the project. „With external support, we wanted not only to map new workflows, but also to be able to create and add our own workflows later on. novaCapta convinced us with the user-friendly Power Platform from Microsoft.“



“Automation is not a sprint, but a marathon. Together with novaCapta, we have already managed to automate 40 percent of the incoming requests in the new tool.”

Roberto Liviero – Solution Architect, Gebäudeversicherung Bern (GVB)

1. Workflow: Concluding contracts online

The first Power Platform solution automated the process for concluding contracts. Previously, a potential customer filled out a website form, GVB employees received an e-mail, checked the information provided against the existing data in the SAP system and, if the data matched successfully, sent out the contract documents. Today, when a potential customer fills out the website form, the matching of the data is automated. Power Automate starts the workflow after the e-mail is received and triggers the mailing of the contract documents if the check was successful. All process steps are documented so that employees can track the progress of the customer request at any moment or, in rare cases, add missing information to complete the process. In this way, the team saves valuable time while maintaining an overview.

2. Workflow: Automatic sending of offers

„Appetite comes with eating. That’s why, after successfully automating the first process, we wanted to set up the automatic sending of offers,“ Roberto Liviero, Solution Architect at GVB, explained. Offers can be requested directly via the GVB website. Previously, the offer was created by the responsible team and sent by e-mail – now both steps are automated. Depending on the offer, suitable documents get added to the automatically generated e-mail, such as an overview of benefits and general

terms and conditions of insurance. The offer is then created as a lead in Dynamics CRM so that the GVB customer advisors can contact customers according to their area of interest.

3. Workflow: Ordering policies

In recent years, many changes caused updates to GVB’s policies. Since the changes do not affect existing customer relationships, GVB decided to set up a request option on the website and send the new policy only upon

request. In this way, the new policy did not have to be printed out 400,000 times, but was sent only around 100 times on request – generally by post, or by e-mail if requested. Again, after a request via the website, Power Automate takes over and sends the appropriate policy automatically.

Overview of all workflows

With a Power App, all workflows can be monitored and, if necessary, analyzed to capitalize further automation potential. Via an interface to SAP, employees can make a live query of the data at any time. For a better overview, only the cases relevant to the respective department are displayed. In GVB’s existing Confluence, the three workflows were fully documented in order to store the know-how and have it available at any time.

Even more automation

The next workflow is implemented independently by a GVB team. After participating in the „App in a Day“ workshop, the employees directly use a concrete example to implement what they have learned. A permanent contact person from novaCapta is available to the team at all times should they have any questions. In regular online meetings as well as via chat, the team receives feedback, suggestions and, if necessary, solutions.

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