



Flexible, Lightweight Process Automation in just 48 hours

How Switzerland's largest healthcare insurer deployed Camunda in two days

The Background

One in four Swiss people are insured by Helsana and the 100-year-old business manages around 110million CHF insurance claims and payments each month.

However, the company's legacy, paper-based processes were holding it back. For example, there was no easy way for customers to buy and approve products online. Despite the ubiquity of online commerce in the insurance industry, there was resistance to making the process changes that were necessary.

Dr. Eric Euerlings, Helsana's senior integration domain architect, said many of his colleagues had bad experiences with monolithic, centralized process engines in the past. Process owners and technologists were united in wanting to avoid the long hours of additional work,

brittle code and expensive consultancy fees that plagued past process automation projects and, above all, they didn't want another monolith.

Convincing Key Stakeholders

Changing peoples' minds about modern, lightweight and flexible process automation wasn't easy. "We needed a new way of thinking," he said. "It's easy to say you need to buy a software licence. But in a 100-year-old company you have departments that still work as though the processes are 100-years-old. Bringing about change is quite difficult."

Instead of making change a technology issue, Dr. Euerlings made it a business challenge. "We decided, right from the start, that we needed to bring different

stakeholders together into one project," he said.

Typically, business process engines had been bought by business analysts and process owners, which were then handed over to the operations team to integrate and run. "But there's no buy-in, so it won't be successful," Dr. Euerlings said. "You must show how this benefits the business as a whole and how flexibly you can deploy it. You must build an enthusiastic team, share know-how and upskill all stakeholders."

Verify Your Thesis

Starting with a straightforward Proof of Concept, Dr. Euerlings and his team wanted to prove that a non-invasive introduction of Camunda BPM into Helsana's backend ecosystem was not only possible, but incredibly easy. Their

target was a simple customer self-service sign-off on the website, enabling customers to verify their identity and purchase products directly online.

Working with the business process owners to take full advantage of their innate knowledge, the POC team successfully ripped the traditional code out of the old user interface, replacing it with a BPMN process modelled in Camunda.

Alongside, the team built a 'Helsana Process Cockpit' based on Camunda Optimize, which shows the status of the self-service sign-off process at-a-glance and whether there are bottlenecks that need to be addressed. This was integrated into the company-wide email system, so if a business process owner wants to know, for example, how long the underwriting process is taking, they

can sign up for email alerts and receive automated updates.

"It worked immediately," Dr. Euerlings said, "This cockpit allows us to show our stakeholders where problems are arising -- adding value without any added coding. It worked straight out of the box."

In just 2½ days the team completed the POC, backend integration, output management integration, ERP contract process and compiled documentation.

"We had a week-long PoC and the management presentation took us almost more time than the engineering," Dr. Euerlings said.

Within the first three months of the go-live, 15,000 applications were made via the self-service sign-off.

Looking to the future

Training is an important factor at Helsana, where stakeholders are empowered to develop new skills to continuously improve processes. After the success of the POC, Helsana arranged five days' onsite Camunda training -- three days dedicated to BPMN and a further two days' developer-specific training.

"Our business process owners joined us for the BPMN training and enjoyed it so much that they all stayed on to complete the developer training," Dr. Euerlings said. "We've also established a BPMN tribe - they discuss new ideas, arrange and attend meetups in the wider community and showcase our results. This has been so effective within the business that we have a backlog of new project requests."

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