

# Overcoming future challenges with efficient processes

Via interdisciplinary workshop teams, consisting of expertise carriers from Protekta, and under the leadership of MAK Consulting AG, end-to-end process chains that create value can be worked out efficiently, uniformly, transparently and in a forward-looking way. In the workshops, various types of potential for optimisation have been identified and parts and steps of the process have been collected and simplified. The processes also serve as the basis for verification and completion of system requirements for the new core IT application. Another precondition has therefore been created so that Protekta can continue its history of success in the future too.

## Initial situation

Protekta, a leading Swiss legal protection insurance company and a subsidiary of the Mobiliar Group, has seen an above-average growth in its premium volumes in the last few years. With a greater number of customers to support, the staff levels have also increased. Protekta therefore faces the challenge of delivering its services in a more customer-friendly and targeted way and even more efficiently in the future, despite or even because of its growth. One of the important preconditions for this, is clearly defined and manageable processes. For this reasons, Protekta decided to revise, transparently present and use the optimisation potential of the relevant processes that add value, with the support of MAK.

At the same time, the core IT application at Protekta was at the end of its lifecycle and was to be replaced by a new system. The core application significantly supports the business processes. It was therefore decided to proactively use synergies between the two projects, "process development" and "core application". In particular, the specification for the new core application should be verified and aligned using knowledge from developing the process

**« A process can be mastered if it is measurable.  
Only what is measurable can be directed.  
Only what can be directed can also be improved! »**

*Quote from Prof. Dr. Hartmut F. Binner*

# Success Story

## Protekta

### Requirements and objectives

**Protekta commissioned MAK with developing and presenting the process for priority business cases, taking into account the following requirement:**

- Customer-oriented end-to-end process chains (from the customer requirements to the result)
- Identification of optimisation potential to increase efficiency
- Closing the gaps and eliminating duplication in the process
- Low use of resources on the part of Protekta
- Consideration of the specifications on the part of the Mobiliar Group with regard to process presentation
- Enabling verification and completion of the requirements for the future core application

### Methodological process

#### Setting out the project focus

As preparation for developing the process, the Protekta process landscape was worked out with the client and then priority processes were identified for the first project phase. With prioritisation, the focus on the one hand has been placed on process with high added value element, as due to the throughput volume for these processes in particular, there has been potential for an increase in efficiency and effectiveness.

On the other hand, processes with a high IT element have been selected, as the knowledge of these processes was an important precondition for the implementation and optimum configuration of the new core application.

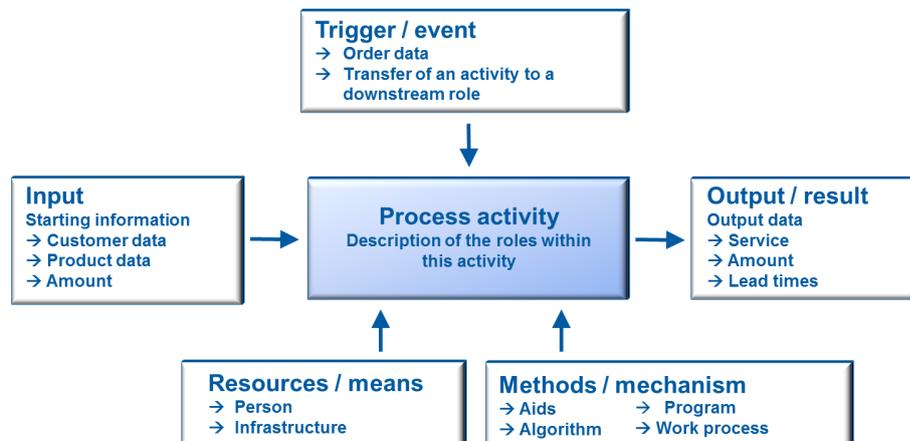


Image: Analysis methods according to DeMarco

### Developing process

With inter-disciplinary, cross-departmental teams, the process chains have been drawn up in workshops and the individual sub-processes worked out. Using analysis methods according to DeMarco, all information on individual process stages has been recorded systematically, efficiently and transparently. Based on the workshop results, MAK has worked out the process presentation and description and coordinated the individual sub-processes and process parts with one another. The business cases have

been thoroughly demonstrated and the interfaces as well as the responsibilities clearly defined.

Based on the focused process discussion in the workshops, potential for optimisation has been identified, which has been directly implemented or prepared for in-depth analysis for the client. It has therefore been possible to standardise the process parts and stages, among other things, in various departments.

# Success Story

## Protekta

### Approval and implementation in the process management tool

The resulting processes have been checked, completed and approved by the workshop responsible heads of departments. Following approval, the processes, including the descriptive features, have been implemented in the process management of the Mobiliar Group. The processes worked out are now available for all employees of Protekta and are centrally archived.

### Results achieved

MAK has completely fulfilled the requirements and objectives and developed the desired results in the context of the project. The results have therefore been achieved in the short time frames required, within the agreed cost matrices and to the desired quality.

Specifically, the following delivery results have been developed:

- Uniform and structured business processes in the form of end-to-end process chains (from the requirements to the result), depicted in the process management system
- A summary of the applicable documents referenced in the process
- A brief introduction to navigation in the process landscape for employees
- Systematic listing of other optimisation potential for the attention of the client
- Individual work instructions, resulting from discussions in the workshops (example: differentiation between the business cases with regard to the formal requirements).

The following objectives could be achieved via the project:

- Transparency and communicability of the processes have been improved
- Responsibilities and interfaces are simple to view
- Availability of process expertise is ensured
- The basis for a comprehensive process archive has been set out

- New employees can be incorporated efficiently and according to uniform guidelines
- Processes have served as the basis for verification of the requirements for the core application and creating the test script
- Qualification for later implementation of further optimisation potential

### Quote from Patrizio Bühlmann, CEO

“MAK has fulfilled its task to my greatest satisfaction. Despite the short-notice granting of orders, the short scheduling and budget restrictions, a clean analysis was carried and high-quality and lasting delivery results developed. Many valuable discussions were entered into, which led to optimisations beyond the project. The MAK project team is performed competently, carried out the project professionally and was quickly accepted by the Protekta employees. The project result – the process documentation – corresponds to the requirements of Protekta and is regularly consulted as a basis for different questions. I would like to thank MAK for their commitment and would be pleased to recommend MAK”.



Patrizio Bühlmann  
CEO Protekta

# Success Story

## Protekta

### **Protekta** Rechtsschutz

Protekta, a well-known subsidiary of the Mobiliar Group, was founded in 1928. It offers comprehensive and independent legal protection for private individuals and companies. With a premium volume of more than CHF 65 million and around 100 employees, Protekta is the second largest legal protection insurance company in Switzerland.

#### Portrait MAK

MAK Consulting AG is an independent consultancy company in the fields of consulting, project management and implementation as well as operational business support. MAK always strives for business excellence in its actions and processes (certificated as EFQM-recognised for excellence). Thanks to its proven practical experience and tried-and-tested methodology instruments, MAK makes substantial contributions to the goal-orientated and lasting further development of companies

Cooperation with MAK brings tangible results, such as:

- Improvement of competitiveness
- Optimisation of added value
- Promotion of growth
- Effective impact of instruments
- Efficient execution of projects



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