



josh was identified, through the StartPointNet software selection, as the ideal tool to comply with regulations and as a BPM (Business Process Management) tool.

Thanks to its flexibility and ease of use, it was straightforward to design, map and move on to the Governance of all the corporate processes.

Walter Viera - Manager of the Information and Organization Systems for Apulia

APULIA PREVIDENZA

Management of corporate processes and automatic document production

The Company

Apulia Previdenza SpA is an insurance and reinsurance company operating in the field of life insurance and collective policies and in insurance services reserved to employees and management personnel. Thus, it is a reliable and efficient social insurance partner for companies that wish to supply this fundamental service to their employees in accordance with the regulations in force. The company was founded in 1987, it is part of the Veneto Banca SpA group, after having been purchased by Banca Apulia in 2007, and it is a network partner of the Swiss Life group in Italy, one of the leading global insurance companies, active in more than 70 countries.

it Consult for Apulia Previdenza

it Consult, with josh, allowed Apulia Previdenza to face and overcome with little effort the challenge of switching from paper to all-digital, by automating its key processes.



www.itconsult.it

Apulia Previdenza is a reliable partner for companies and consumers and it is specialized in life insurance and in particular in collective policies reserved to employees and management personnel. It has been part of the Veneto Banca group since 2007.

Apulia Previdenza

Case Study

Apulia Previdenza

www.apuliaprevidenza.it



In partnership with
StartPointNet,
a josh Gold Certified Partner.

THE NEED

Govern the processes and automate them, overcoming the increasing difficulties arising from stringent regulations and competition.

Apulia Previdenza's most pressing needs were meeting with regulatory compliance, among which is Solvency II: a European Union directive that came into force on January 1, 2016.

Especially regarding the **Governance and Risk Management**, the provision highlighted the need to map the operational processes: having a deep knowledge of the process (the who, how and when) became fundamental for the subsequent activities of identification, assessment and mitigation of risks.

Always in regard to compliance with regulations, Apulia Previdenza had **the need to improve transparency and efficiency** by using a tool allowing processes design and automated production of related documents which were previously prepared manually: for example, with the former process used for physical documents filing it was easy to lose sight of the time involved into its activities. Also, it was not possible to assess the burden on individual resources and it was expensive to search for answers sent in regards to the documents received.



Complying with regulations, among which Solvency II, and achieving "best in class" performance levels.



THE SOLUTION

All of the flexibility of josh to map the processes and execute them with full efficiency.

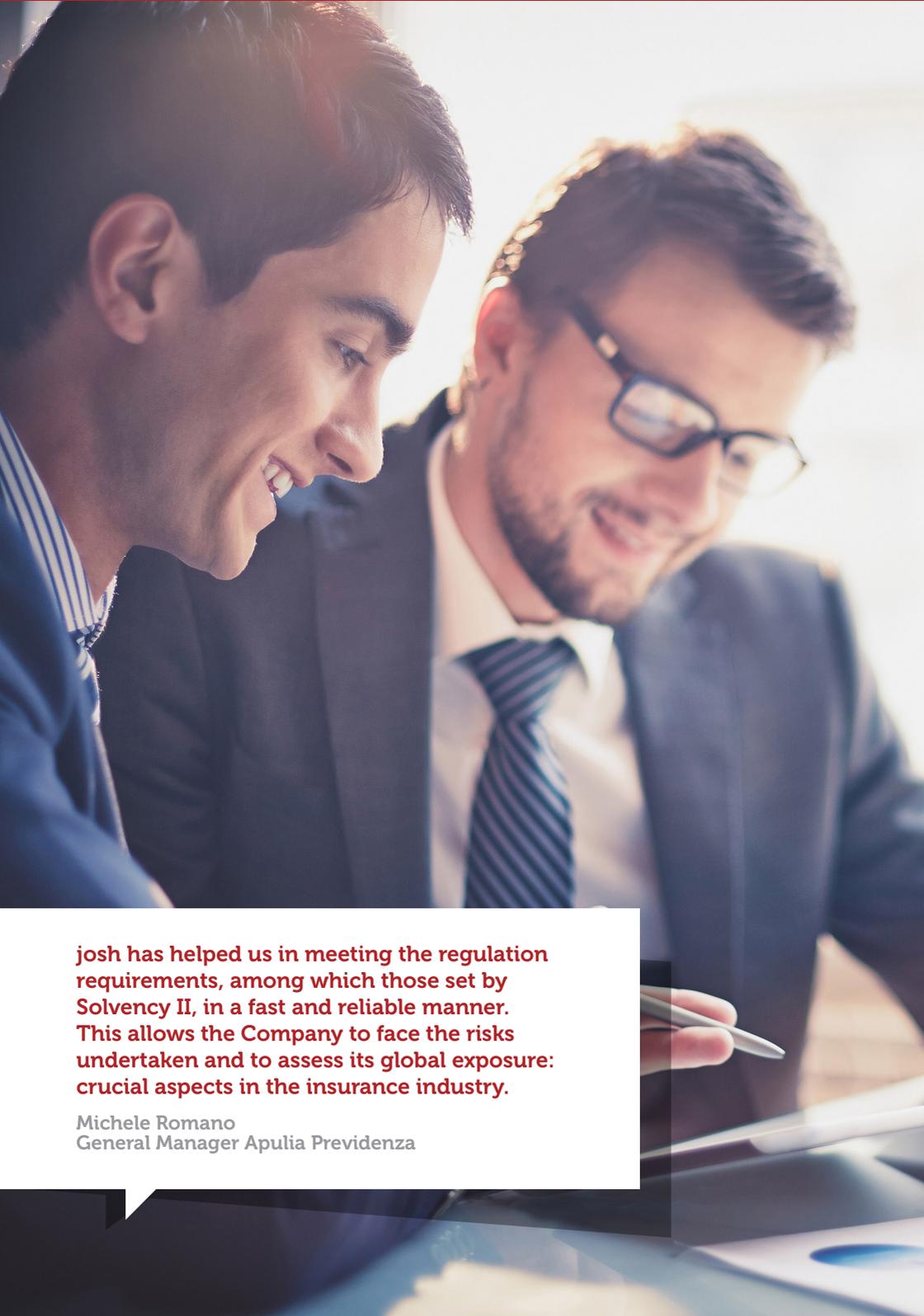
The solution for the needs expressed by Apulia Previdenza was found in the use of josh: initially, only in certain key processes and then across all of Apulia's activities.

The first processes implemented were:

- 1. Registration of incoming documents**, which were previously managed manually with physical records;
- 2. Claims management**, production of documents containing information used for the IVASS statistics on claims, previously managed with Excel workbooks;
- 3. Mandatory deadlines with penalty**, the timetable was previously managed with Excel workbooks;
- 4. The Change Management process**, a process referred to in the Solvency II legislation, that serves to trace all the single changes to the data and the system, which was originally managed through paper documents.

The choice of josh occurred following a **careful selection that took about 1 year and involved the leading companies** of products for the automation of corporate processes (Business Process Management) and for the sharing, management and research of the archived information (Content Management System). The reasons why josh was chosen was mainly due to its ease of use and the possibility to design and map the processes independently, in addition to the vast possibilities of control on the various phases of execution of the processes and the speed of implementation. Another key feature of josh is the strong integration with the SharePoint document archive, which allowed the introduction of a far more powerful archiving system in comparison to the File System.

Designing processes and automatically producing the related documents.



josh has helped us in meeting the regulation requirements, among which those set by Solvency II, in a fast and reliable manner. This allows the Company to face the risks undertaken and to assess its global exposure: crucial aspects in the insurance industry.

Michele Romano
General Manager Apulia Previdenza

THE BENEFITS

Bringing the Company to a higher level of competition and performance, remaining compliant with the Solvency II regulation.

The analysis of the processes has allowed Apulia Previdenza to obtain economic benefits in addition to higher productivity and efficiency.

Thanks to josh, Apulia Previdenza is capable of controlling the response times dictated by IVASS regulations, distributing the workload of the single resources in a more efficient manner, thus gaining productivity. Searching for documents has become a lot simpler and faster, thanks to the use of SharePoint.

From an initial situation in which the users were passive participants, **users have grown aware** and are now an active part of the process: with josh it is simple to modify the ongoing processes, as new needs show up.

Executing processes with josh has helped users to meet the deadlines of each case, avoiding oversights or delays which could lead to monetary penalties and claims.