THE FUTURE OF AUTOMATION: BALOISE MIGRATES AI SOLUTIONS TO THE INSIDERS CLOUD

Baloise Insurance has been using Insiders Technologies' AI solutions for document processing with great success for almost 15 years. As part of its overarching cloud strategy, Baloise fully migrated all its clients to the Insiders Cloud last year, thereby benefiting from faster innovation and more efficient implementation of business requirements.

CUSTOMER
Baloise Holding AG

COUNTRY
Switzerland and International

HIGHLIGHT
Complete migration of AI-based input management to the Insiders Cloud

PRODUCTS
GenerAItor, OmnIA, OvAItion and Account Payable Processing

The Swiss insurance group Baloise, headquartered in Basel and with subsidiaries in Belgium, Germany, and Luxembourg, has been taking care of its customers' financial needs for more than 160 years.

Under the premise that "Doing nothing is not a solution!" Baloise IT is pursuing a clear multi-cloud strategy in order to continue to fulfill its role as a driver of innovation within the company in the future. For its services, it has set up a hybrid cloud consisting of a private cloud and an Azure-based public cloud.

Baloise supplements this setup with cloud offerings from manufacturers such as Insiders Technologies or other business partners who offer SaaS solutions. By using the Insiders Cloud for AI-based input management, Baloise has reached an important milestone in the implementation of its cloud strategy.

HIGH PERFORMANCE IN MULTI-CHANNEL WITH ZERO ERROR TOLERANCE

For the insurance group, performance in input management is of central importance: all incoming documents - whether digital or in paper form - must not only be processed on the

CHALLENGES

✓ Performance: same-day processing of all incoming documents required
✓ Zero error tolerance requires maximum precision during classification and readout
✓ Wide range of input channels - chat, app, and portal in addition to paper and emails
✓ Numerous different use cases - in the insurance business and internally
✓ Need for speed: many departmental requirements for new use cases

same day. In the sense of real-time processing, they need to be available in the corresponding systems as soon as possible after receipt in order to answer customer queries, for example.

The high demands on the performance of the solutions go hand in hand with the quality requirements of a zero-error policy: Incoming documents must be assigned correctly without ifs and buts.

Baloise relies on a multi-channel approach, and input management must, therefore, support different channels - from classic paper to email to input via chat, app, and portal.

THE BROAD SPECTRUM OF DOCUMENT CLASSES MEETS MANY DIFFERENT USE CASES

The range of incoming documents at Baloise is extensive. The systems need to recognize more than 250 document classes reliably and read the relevant data with the highest precision. It is in the nature of things that the form and format of the individual documents vary greatly and are also subject to constant change.

This change is also reflected in the large number of use cases for processing documents. The use cases range from general incoming mail to document management for the insurance divisions and external contract management through to internal use cases such as the processing of HR documents or incoming invoices.

SOLUTIONS FROM INSIDERS AS A SAFE BANK

Baloise has been using solutions from Insiders Technologies as central components for AI-based automation in input management since 2010.

Today, Baloise uses Insiders AI OvAItion and the OmnIA platform for intelligent automation to recognize and read unstructured documents of all kinds. With Insiders Technologies' account payable processing, the processing of incoming invoices has been optimized and largely automated.

As part of a development partnership, Baloise also uses the new GenerAItor for the no-code development of AI services..

SIMPLE AND FAST CHANGEOVER - STEP BY STEP

Within around 18 months, Baloise migrated all six instances of the input management solution step by step to Insiders Cloud Services.

A new middle layer serves to unbundle the internal systems as a prerequisite for integrating cloud services. By connecting the Insiders Cloud and the new middle layer, the team implemented the desired real-time processing with event-driven control. This means that incoming damage reports are now available in the system in detail within minutes, regardless of the input channel.

"Insiders translates all relevant AI trends from research into practice-oriented solutions. The innovative products are our universal tool for processing input of all kinds, and we derive great benefits from their use in the automation of processes."

TIMO KOHLER
PRODUCT OWNER INPUT MANAGEMENT, BALOISE

Image: baloise

The insurance company places particular importance on data security. The new constellation also played a role here: Baloise was one of the first major insurance companies from Switzerland to transfer data to an EU country - to Germany, to be precise - which required exceptionally detailed contractual regulations.

New ground was also broken in terms of encryption: all data is always encrypted and is only decrypted for direct processing. The processing results are automatically deleted immediately after transmission. T-Systems International GmbH acts as the key management provider, and ownership of the decryption keys lies exclusively with Baloise.

The entire concept and the resulting systems have undergone intensive security assessments.

VENDOR CLOUD WITH CLEAR BENEFITS

Switching to the Insiders Cloud with its innovative SaaS solutions offered Baloise a wealth of benefits.

By using the solutions operated by Insiders Technologies directly, Baloise is always up to date and benefits from technical innovations and improvements at an early stage. Lengthy internal migration or update projects are a thing of the past. Insiders Technologies manages the transition to the latest product versions. Thus, Baloise has easier access to new products and no longer has to bear the costs and personnel expenses of operating the solutions.

In addition, there is no longer any need to maintain internal know-how for the development and operation of the products.

Instead, the know-how can be bundled with the respective experts: OmnIA, OvAItion, and Account Payable Processing at Insiders Technologies, as well as integration and insurance subject matter expertise internally at Baloise.

Thanks to a reduced workload for the internal team and the concentration on the respective core competencies, new requirements can be implemented much more flexibly and quickly.

"The potential of Insiders' AI OvAItion, especially with the possibility of integrating LLMs, is huge. We currently have a to-do list of around 50 use cases that we want to automate and optimize with AI. The Insiders Cloud and the No-Code-GenerAItor make implementation particularly easy for us."

TIMO KOHLER
PRODUCT OWNER INPUT MANAGEMENT, BALOISE

BENEFITS

- ✓ Faster access to product improvements and innovations for new use cases
- ✓ Relief and concentration on core competencies in integration and business innovation
- ✓ 3 to 4 times faster implementation of requirements
- ✓ Entry into a self-service model for the generation of AI services by the specialist departments

In the past, the team was only able to implement one use case in parallel to complement operations, but now - thanks to the new collaboration model - three to four use cases are implemented simultaneously.

Since spring 2023, input management at Baloise has been working fully productively exclusively with the cloud services of the Insiders Cloud. The switch opened up completely new possibilities for Baloise, accelerated optimization measures, and spurred innovation through state-of-the-art AI.

SELF-SERVICE BY DEPARTMENTS WITH A NO-CODE APPROACH

As part of a development partnership, Baloise began in 2024 with the introduction of a self-service model for the implementation of new AI use cases by the specialist departments.

The new GenerAItor from Insiders allows the development of AI services for extracting information from any document with a simple, user-

friendly editor, even without programming knowledge. The business departments have already used it to implement various use cases - from postal returns processing to fraud prevention - with great success.

"We've been waiting for this for a long time!" was the enthusiastic response from the business departments, proving once again that great automation starts with input management.

Image: baloise

KEY-FACTS

- ✓ More than 250 document classes create high-complexity
- ✓ High volume with around 140,000 documents per
- ✓ Documents with up to 1,000 pages in some cases
- ✓ Great potential for automation through AI: more than 50 use cases on the to-do list

Image: Insiders Technologies

INSIDERS CLOUD: A SCALABLE, SECURE, HIGH-PERFORMANCE INTELLIGENCE

The Insiders Cloud provides all Insiders products as flexible cloud services - efficiently and individually configurable, secure, and scalable as required. All documents - from invoices to medical papers - can be recognized and evaluated across all industries using state-of-the-art AI technologies. This means that all scenarios relating to input management and customer communication can be implemented without lengthy projects, extensive installations, and costly investments in IT infrastructure. In production since 2017, the Insiders Cloud is used by companies and organizations of all sizes and processes millions of pages per year. Development and operation are certified by ISO/IEC standard 27001, as is the data center in Germany.

https://insiders-technologies.com/en/cloud

ABOUT BALOISE

At Baloise, everything revolves around the future. We make tomorrow easier, safer, and more carefree for our customers and take responsibility for this today. We are more than a traditional insurance company. With our smart financial and insurance solutions, we create a holistic service experience. In our daily work, loyal care, reliable cooperation, and trusting relationships are key elements of our interactions with our stakeholders. We have our customers' backs when it comes to financial matters so that they can take care of the important things in their lives and find inspiration for new things in their everyday lives. As a European company with headquarters in Basel (Switzerland) and subsidiaries in Belgium, Germany, and Luxembourg, Baloise has been operating for over 160 years and currently employs 8,000 people.
www.baloise.com

ABOUT INSIDERS TECHNOLOGIES GMBH

Insiders Technologies is a technologically leading and market-established provider of software for cognitive process automation. More than 5,000 customers from all industries rely on the innovative solutions of the Kaiserslautern-based product house to optimize their document-centric business processes. As the most successful spin-off of the German Research Center for Artificial Intelligence (DFKI), Insiders has set itself the task of transforming state-of-the-art AI into real customer benefits. Thanks to the latest deep learning technologies, the software solutions understand heterogeneous content, extract business-relevant information, automate transactions, and shorten response times. The company's pioneering technological spirit and agility guarantee continuous innovation and cutting-edge products.

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