CAVIMAC

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Le régime social des cultes

CAVIMAC chooses Elise to improve Customer Relationship Management

CAVIMAC is a French Social Security organization dedicated to members of religious communities. It manages more than **120,000 customers** including membership, collecting contributions and providing sickness, old-age and disability pensions.

Elise, an electronic content management solution, developed by NeoLedge, was chosen in 2011 to improve digitization and management of incoming information flows which were not being managed through existing business applications.

The key objective for the organization was to **improve the quality of relationships** with its customers and to enhance **Customer Relationship Management.**

THE CONTEXT

In recent years, CAVIMAC implemented other social security systems to handle an increasing number of regulations and high IT development costs. This has lead to difficulty integrating special features.

« Elise provides a consolidated, global view of our customers' information and file status from all business applications. This enables us to answer customer inquiries faster and use our applications to manage more detailed activities. It has improved the overall quality of our customer relationship management,» explains Mr. Jean-Guy Meschi, CAVIMAC Assistant Director.

THE CHOICE OF ELISE

The main objectives for the implementation of Elise in the CAVIMAC organization were:
- Digitization and limitation of paper
- Traceability for better risk-management
- A single tool for customer relationship management across all sectors

« We've chosen Elise because it best meets our bill of specifications, especially concerning the workflows and the monitoring of different contributions. This tool seems to us the most adaptable to our current habits and was extremely close to our current paper-based processes. Moreover, this solution was interesting for activity monitoring and statistics,» says Mr. Meschi.

Elise is used now by more than 120 users and is managing more than 800,000 documents.

THE MAIN ASSETS

Dealing with different activity sectors means working with different information systems which have various levels of interoperability with each other. However, a higher level of expertise is required to use these systems efficiently.

According to Mr. Meschi, *« We were looking for a unique tool able to consult and track the different stakeholders of each process, to identify the agents in direct contact with customers and to have a global overview of exchanges and internal action processes without needed to connect to existing business applications.»*

THE BENEFITS

More than 200 document types are currently managed in Elise (claims, information requests, duplicate copies, convocations, reminders, quotes, etc...), distributed by sector (retirement, disease, etc...). Each document type has specific process deadlines applied and Elise is used as a steering tool for processing objectives.

« The implementation of Elise has enabled us to review each procedure for business document management. We've integrated where and how control was operated. We've revised the whole organizational context of customer relationship monitoring. This application gives us the opportunity to set up a frame for managing the organization of information flows in Elise for each service manager,» Mr. Meschi explains.

Moreover, the French State has initiated a responsible approach focused on sustainable development for each Social Security organization. Concerned by public policies, CAVIMAC used Elise to launch a process of security and traceability. It has managed to save time and reduce paper usage by 30 to 40%.

Since CAVIMAC handles medical activities, the medical advisor asked the French Medical Board to allow CAVIMAC to use Elise for managing highly sensitive medical data. *« Because of Elise's access rights management, we've proven all data will be secure within Elise and we can adhere to strict privacy and compliance standards,»* Mr. Meschi says.

PROJECT PLANNING

End 2011
Project launch: functional and technical specifications / Implementation of the application: installation, settings and tests

April-May 2012
Elise is used to digitize all documents within General Services, with workflows to automatically transfer to the right departments/service. Then, Elise was deployed across Production Services (disease service, social work, membership, contributions collection, retirement, etc...) followed by Support Services (HR, IT, etc...)

March 2012
Requirements test: to check if the services comply to the initial requirements and settings

May 2012
Production launch: Storage digitization phase with the implementation of Elise connector / Implementation of a Communicating Electronic Strong Box from the company Cecurity.com

Elise from NeoLedge is an integrated software which incorporates Electronic Content Management (ECM), Workflow and Case Management technologies and addresses the most complex information management needs.

Developed to simplify internal processes and improve management of information, it helps any organization regain control of incoming and outgoing content.

Elise 5

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