



A Perspective on Collaboration in Insurance from Zurich

Lotusphere Comes To You
SNoUG-Tagung

March 24, 2010

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Agenda

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Zurich: Introduction

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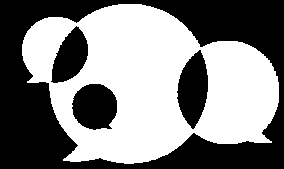
Business Drivers and Approach

3

Solution and Lessons learned

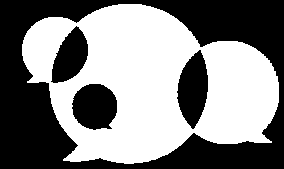
4

Benefits expected from Collaboration suite



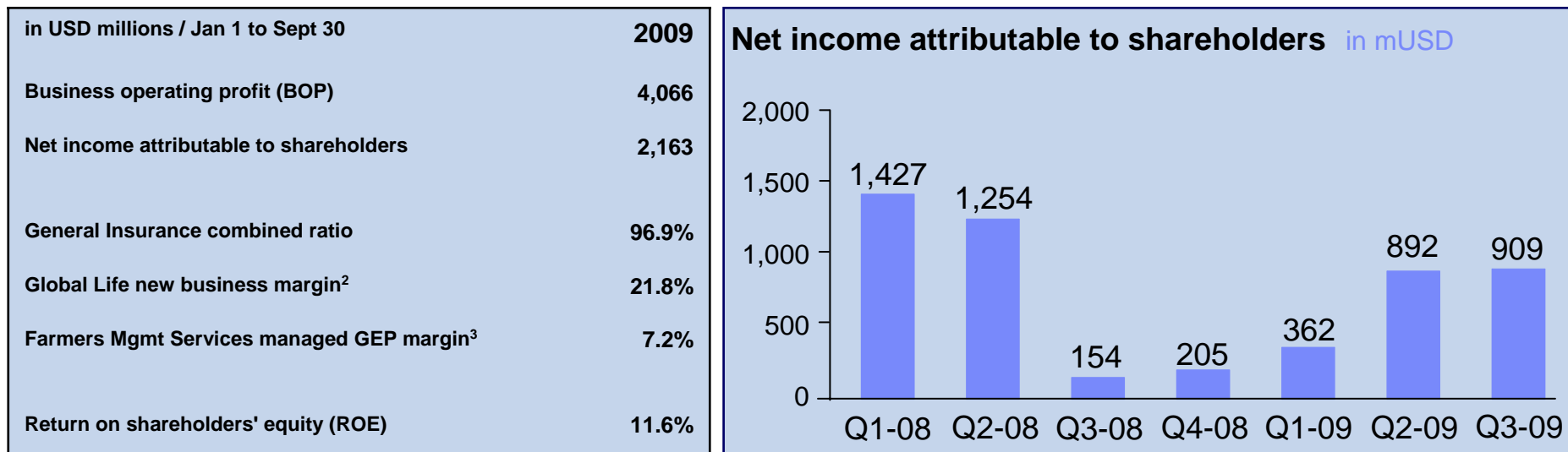
Zurich – the Global Insurer

- Zurich Financial Services Group (Zurich) is an insurance-based financial services provider with a global network of subsidiaries and offices in North America and Europe as well as in Asia Pacific, Latin America and other markets.
- Founded in 1872, the Group is headquartered in Zurich, Switzerland.
- It employs approximately 60,000 people serving customers in more than 170 countries.
- Combined revenue in 2008 was USD 61,472m (including Farmers Management Services)
- In 2009, Zurich and the Farmers Exchanges purchased AIG's US Personal Auto Group (PAG), comprised of 21st Century, including AIG Direct, and their auto independent agency business.



Strong performance during Financial Crisis

Performance highlights per Q3, 2009¹



¹ Source: Q3 09 Analysts Presentation

² After tax, as % of APE (Annual Premium Equivalent).

³ Margin on gross earned premiums of the Farmers Exchanges. Zurich Financial Services Group has no ownership interest in the Farmers Exchanges. Farmers Group, Inc., a wholly owned subsidiary of the Group, provides management services to the Farmers Exchanges and receives fees for its services.



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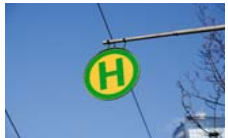
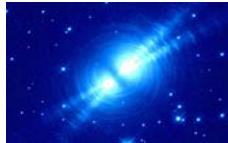
Zurich's Strategy Cornerstones



Zurich's IT strategy is closely aligned to the Group Strategy Cornerstones. To support the execution of the Strategic Cornerstones one key focus lies on increasing IT's agility and responsiveness through:

- Reduced complexity
- Evolution of the global Workplace

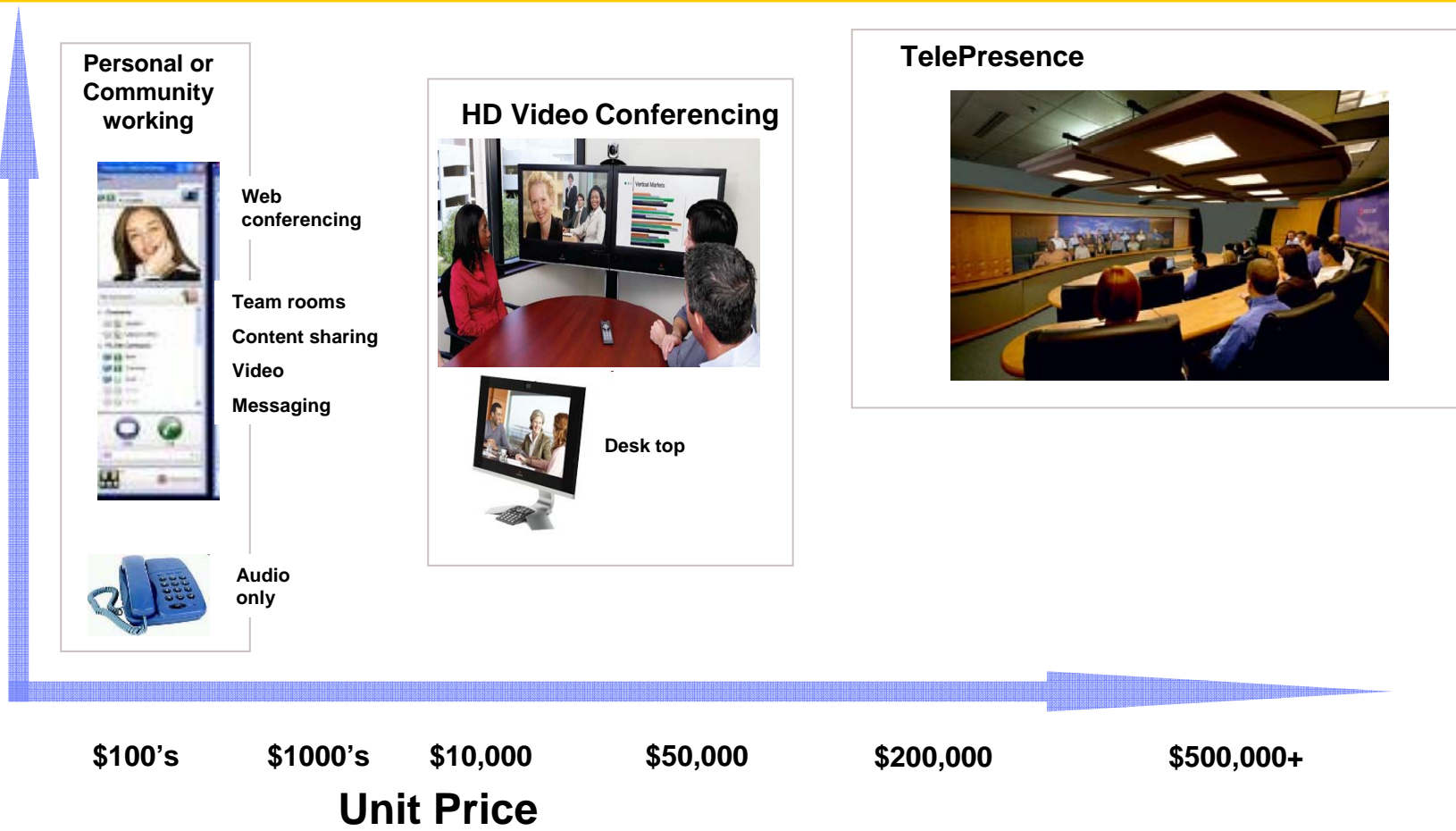
Evolution of the Global Workplace is high on the Agenda



- Global business at the speed of light
- Leverage knowledge and know-how within global organization
- Redefine the experience of face-to-face communication
- Fast, fair, economical and easy
- New way to communicate and collaborate
- End-of product life-cycle approaching and upgrade needed

Balance Zurich's Collaboration needs/investments Face to-face vs Social Collaboration

Quality of Experience





Collaboration Project Approach

- A small team collaborating across boundaries implemented this global platform in a highly efficient team effort (multi-service provider)
- The initial system was productive/accessible by all ZURICH employees just 12 weeks after project kick-off (without new Lotus Notes 8.5)
- The platform successfully supported the Executive Leadership Team meeting in June 2009 and the customer month in September 2009 with its blogging component
- Group Communication and Marketing, the HelpPoint Ambassadors and The Zurich Way were early adopters of this platform
- Technology Scope:
 - Lotus Quickr 8.1
 - Lotus Connections 2.01
 - Lotus Sametime 8.0.2
 - Polycom HD Video-conferencing stations



Critical Success Factor: Early Gain Top Down Management Buy-in - CEO & Strategic Blogs -

Leading Edge “ send your comments ”





Join me in my blog to share successes and observations about what makes this company great.

Jim Schiro
CEO, Zurich



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[April-May 2009](#)

Leading Edge - The CEO Blog



China, as your efforts during these times have be

The other truth that has struck me during the tri meeting with life agents in Hong Kong, talking ab new business models that we might want to purs occurring here. Now we just need to act on thos

[Read the full story >](#)

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Recent Posts



September 2, 2009

Yes we can . . . with Zurich

With Zurich HelpPoint as our rally Japan, I hope you do too.

[Read the full story >](#)



August 7, 2009

Big Day for Zurich

What a day! First, we go in front then after the Board meets and d

[Read the full story >](#)

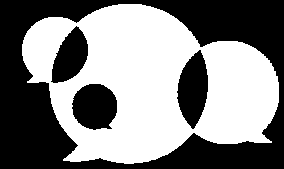


June 5, 2009

Communicating Confidence

This week we had a Leadership T

[Read the full story >](#)



Facts and figures to Zurich Top Leadership Meeting in June 2009

Blogs	No. of blogs	No. of visits
Strategic pillar blogs	4	12,024
Customer Centricity (most popular)	-	3,939
Collaboration platform blogs	29	2,343
CEO blog	9	40,144
Videos	No. of videos	No. of views
Leading Edge video gallery	57	9,969
YouTube videos (since March 31)	18	16,298



Customer Celebration Month in Sept 2009 - 2nd pilot heavily leveraging social media -

The screenshot shows a blog search interface. At the top, there are navigation tabs for 'Browse Blogs', 'My Blog', and 'My Updates'. Below this, there are buttons for 'Start a blog' and 'New Entry'. A search bar contains the word 'customer', and a 'Search Again' button is next to it. The search results show 114 entries found. Below the search bar, there are pagination links (1 - 15 of 114) and sorting options (Date, Title, Most Recommendations, Most Comments). The first few search results are listed with their titles, authors, dates, and comment/visit counts.

Customer offer for Zurich SIPP, PRTP and TIP to co...
Thomas, Sally | 22 Dec 2009 | Comments (0) | Visits (7)

Becoming Truly Customer Centric
Randall, Benjamin | 10 Dec 2009 | Tags: customer centric crm | Comr

Operational transformation - are you bold enough?
Frei, Hanspeter | 9 Dec 2009 | Tags: customer_shoes_initiative operatio

Jim Schiro and Martin Senn Visit the Northeast Reg...
Randall Clouser | 23 Nov 2009 | Comments (5) | Visits (100)

Claims delivers when it matters
Christian Orator | 19 Nov 2009 | Tags: claims | Comments (0) | Visits:

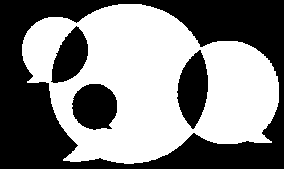
seeing confidence and pride on the road
Bouchard, Francis | 19 Nov 2009 | Comments (1) | Visits (17)

Our team has no issues so we have nothing to impro...
Cameron, Mark | 18 Nov 2009 | Tags: mark cell continuous improvemer

September 2009 statistics:

- Number of countries involved: **80%** of all countries
- Leading Edge page views: **92,589**
- Number of blog entries: **93**
- Number of blog visits: **2,334**

* Number of customer blogs on January 5th, 2010



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HD Video complementing the Collaboration Suite

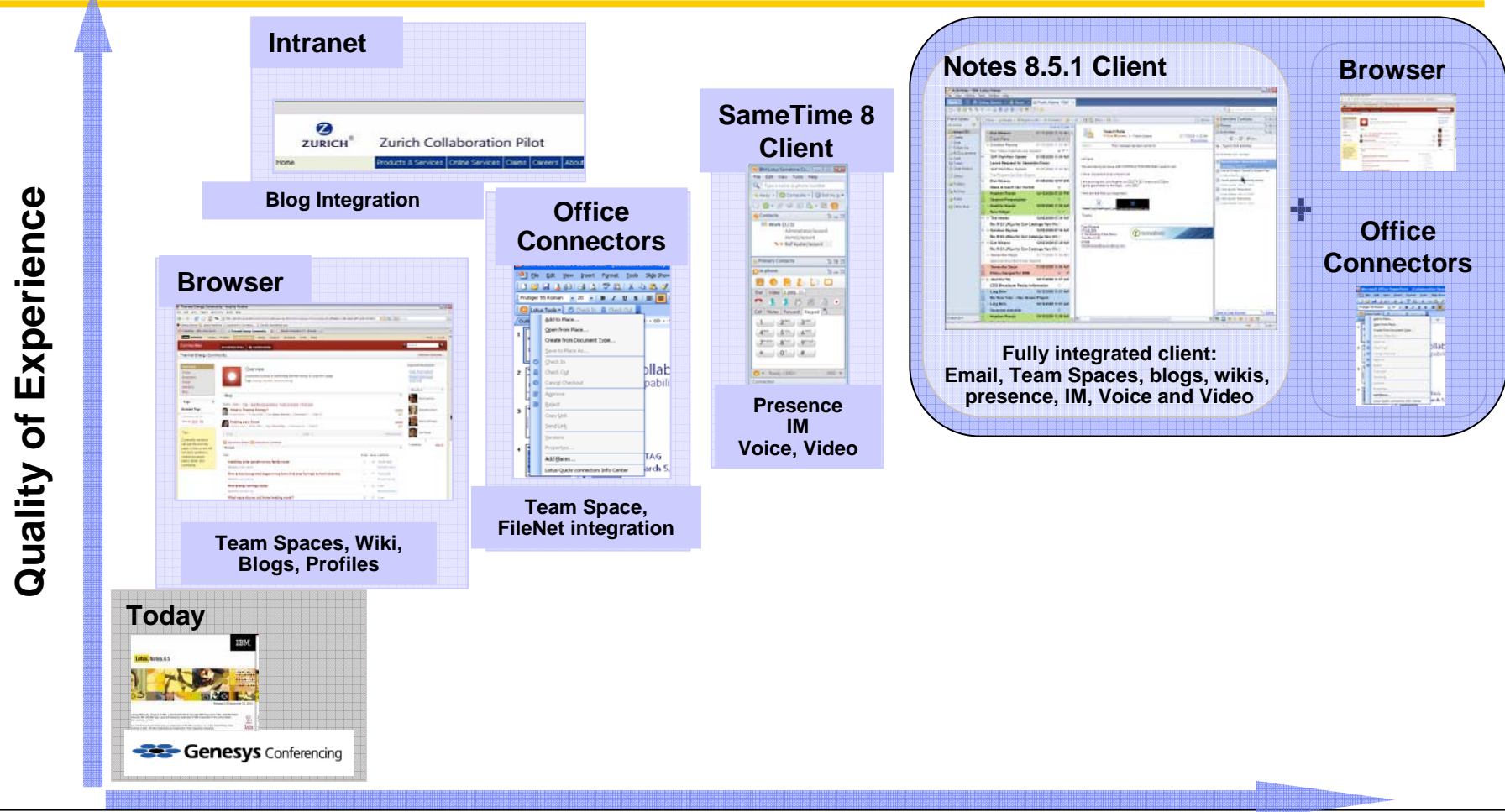
- Zurich built 5 Telepresence Rooms usable in May 2008. These are equipped with RPX 418 (4 screens, 18 seats) and located in:
 - London
 - Los Angeles
 - New York
 - Schaumburg
 - Zurich

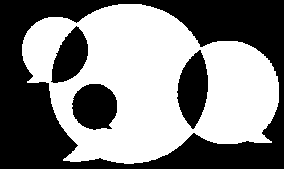


- In 2009, Zurich built 71 high definition video conference rooms
- With comparable voice and visual quality as Telepresence (due to dedicated networks)
- Fully connected with Telepresence facility and using managed service
- Successfully supported reduction in travel expenses



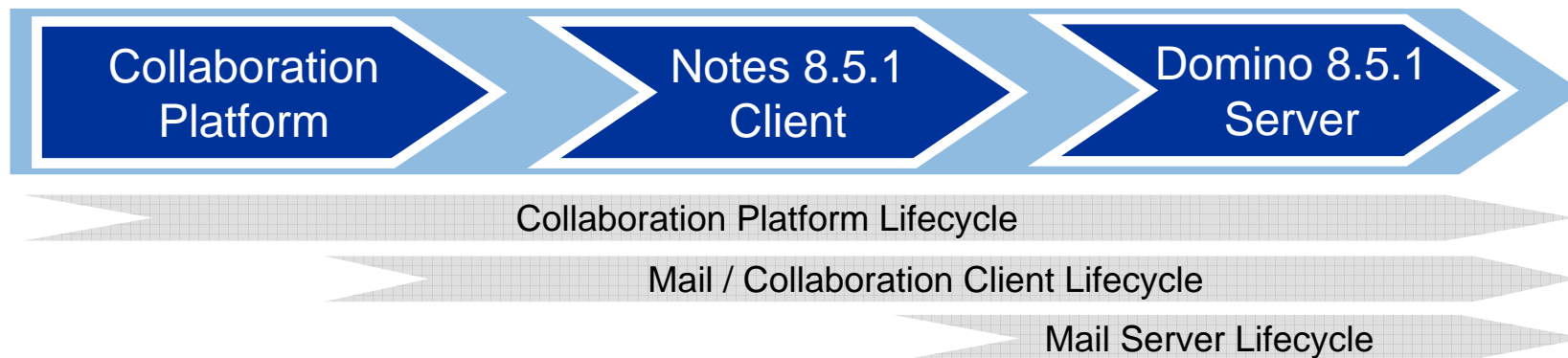
Project Scope Collaboration Experience Roadmap

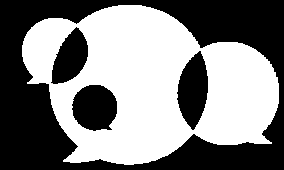




Moving on: Journey towards Mail integration in 2010

- We have taken the first step with delivering social and team collaboration capabilities
- Collaboration in Zurich is delivered in multiple projects and stages, driven by different organizations and early adopters
- We are now providing these capabilities not just via web but also in an integrated experience in the mail client globally from Q1 2010 on
- We will evolve the platform with additional and better functionality and integration to provide an even better user experience
- Planned for early 2010: Connects 2.5 and deployment to mobile clients (Blackberry, iPhone)

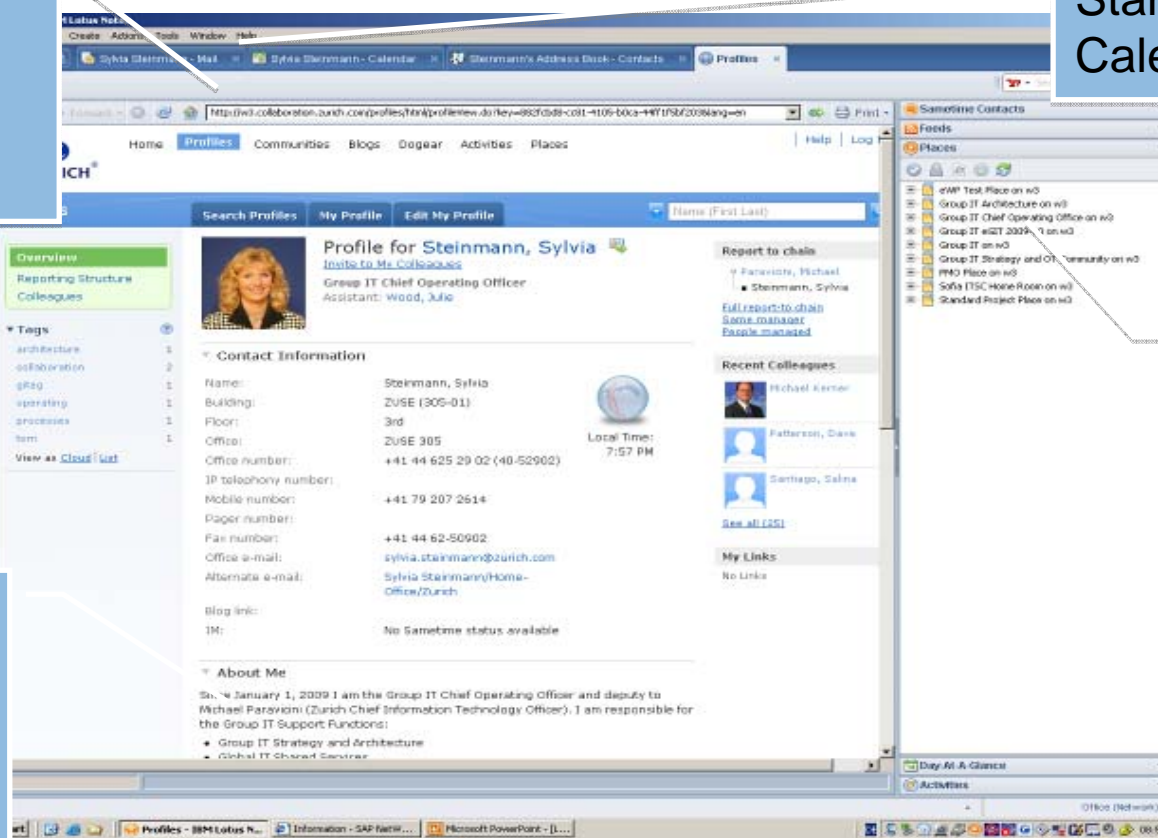




Integrate Collaboration into the Zurich Workplace and leverage Lotus Notes 8.5.1 Roll-out

Integrated collaboration and Social Services

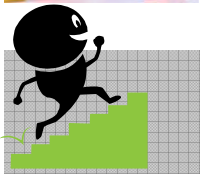
Standard Mail & Calendar features



Integrated Instant Messaging Teamrooms and News Feeds

60.000 employees globally to share their know-how

- Lessons Learned -



- Think global and pro-actively tackle the required cultural change
- Generate top-down Management buy-in early
- Standardize on the basis of “Out-of-the-box” and work with vendor to incorporate required changes into “Standard”
- Evolutionary approach in incremental steps
- Make it easy and fun, and share success stories
- Communicate and collaborate - encourage the vendor to take the customer perspective



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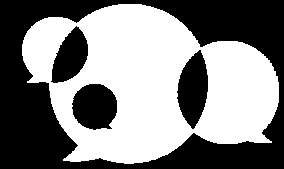
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Community/Personal Working – Benefits

- Enables the true power of Zurich while transforming the way people interact, **communicate** and collaborate leveraging state of the art internet tools.
- Fosters interaction, innovation, sharing of knowledge and best practices in a easy and effective fashion for the Zurich Community
- Provides a Global Directory: to find people/expertise in the collaboration network and tap into the collective knowledge capital
- Enables faster decision making
- Fosters idea generation, idea capture and innovation
- Improves communication (simple global reach of VoIP/Video)
- Reduces travel and communication costs
- Supports Customer Centricity and Operational Transformation and empowers Zurich to stay in a market leading position



Collaboration Roadmap 2010

<ul style="list-style-type: none"> Design Notes 8.5 client 	<ul style="list-style-type: none"> Notes 8.5 Client - Collaboration integration 	<ul style="list-style-type: none"> FileNet integration 	<ul style="list-style-type: none"> Notes Client release (service pack) 		Notes Client
<ul style="list-style-type: none"> Quickr 8.2 upgrade <ul style="list-style-type: none"> Stability Performance 300+ places 	<ul style="list-style-type: none"> Quickr RSS support Communities integration 500 places 	<ul style="list-style-type: none"> Quickr Places housekeeping process 650 places 	<ul style="list-style-type: none"> Quickr 8.5 upgrade planning 800 places 	<ul style="list-style-type: none"> Quickr 8.5 upgrade 1000 places 	Team Place
<ul style="list-style-type: none"> Connections adoption 		<ul style="list-style-type: none"> Connections: Wikis, Personal Files, Microblog Global Directory 			Social Collaboration
			<ul style="list-style-type: none"> Blackberry support 		Mobile
	<ul style="list-style-type: none"> New Sametime community 				Instant Messaging
Q4/2009	Q1/2010	Q2/2010	Q3/2010	Q4/2010	

“Twenty years from now you will be more disappointed by the things you didn’t do than by the ones you did. So throw off the bowlines, Sail away from the safe harbor. Catch the trade winds in your sails. Explore. Dream. Discover.”

This quote has been attributed to Mark Twain (1835 – 1919), but the attribution cannot be verified.

Questions



& Answers