

Case Study:

# Swiss Life opts for paper-free organization in its mortgage archive

The plan was to replace Swiss Life's paper-based archive, which was filled with mortgage dossiers, with a digital archive. With the support of Arcplace, around 25,000 dossiers were digitized in a single project. This has facilitated access to the documents, saved space and optimized management of the documents.

## Initial situation

When it comes to pensions, 1.4 million private individuals and over 40,000 companies already place their trust in Swiss Life's many years of experience. The pension and financial solutions provider was generating ever more mortgage dossiers, which had to be managed and archived. For example, before the digitization project, around 25,000 paper-based dossiers relating to customers and administrative formalities were stored in a cellar. It was laborious to access records quickly, searching for dossiers proved time-consuming and space was at a premium.



## Solution

At Swiss Life's request, a proof of concept (PoC) was carried out in the run-up to the project, in which a run-through of the entire scanning and import process was carried out. Different scan profiles were created for the various dossiers and tests were performed of transmitting the generated PDF/A files via SFTP. Down in the basement archive, Swiss Life employees then packed the dossiers in boxes for transport and Arcplace employees inventoried them in a list.



Overview of the entire dossier inventory



Access to dossiers regardless of location



More space and less archiving effort

The master data recorded during the inventory ensured correct filing of the dossiers in the end system. The packaged dossiers were collected weekly from Swiss Life in a sealed van and delivered to the Arcplace Scan & BPO Center in Glattbrugg. During processing, special set of rules specified which documents had to be sorted out, scanned and returned to Swiss Life. After scanning, Arcplace stored the remaining physical documents in a short-term archive and destroyed them after three months in accordance with the highest security standards.

**"Thanks to Arcplace, the project was carried out in a professional manner and the quality management was of a very high level."**

Urs Schaffner, Head of Service Center Private Customers, Swiss Life

## Results

- Reduced archiving effort
- Time saved thanks to faster document access
- Space saved thanks to the elimination of a physical filing system