

Customer First at SOKA-BAU

New Customer-Centric Service Processes and Development of Online Services

■ **Company**
SOKA BAU

■ **Industry**
Financial services



The involvement of our customers during the development of an innovative online service enabled us to develop a custom-tailored solution for their needs and requests. Scheer supported us in capturing our automation potential and ensuring the quality of the processes and product now and in the future.

— Roland Sonntag, Department Director, Organizational Management | SOKA-BAU



The Initial Situation

SOKA-BAU realized that its target group, employers and workers in the construction industry, hardly knew about the advantages of the social fund procedure, if at all. Many customer inquiries required manual processing by the customer service department. This resulted in longer processing times during peak periods with heavy call traffic. Furthermore, a complex, historically evolved IT architecture impeded rapid adaptation to changing framework conditions and customer requests.



SOKA-BAU is the umbrella brand of two institutions: the Leave and Wage Equalization Fund of the German Building Industry (ULAK) and the Supplementary Health Insurance Co. of the Building Industry AG (ZVK). Both institutions are bodies of the collective bargaining parties in the German construction industry. Both ULAK and ZVK are classic non-profit organizations.

ULAK and ZVK are responsible – based on the respective collective bargaining agreements – for securing cross-company leave entitlements, filling pension insurance gaps, and putting vocational training on a secure financial footing. Established in 1949, SOKA-BAU provides services that are tailored to the special situation in the German construction industry. Its services benefit around one million employees, 80,000 employers, 40,000 trainees, and 360,000 retired construction professionals.



The Solution

SOKA-BAU plans to cut processing times by reducing technical and organizational expense drivers, as well as efficiently designing, developing, and rolling out new (online) services. At the same time, they aim to boost customer satisfaction and acceptance of the social fund procedure significantly through rapid, ongoing consideration of user feedback. Technical and customer services will be made available to customers online, independently of local offices, the infrastructure, and the user devices.

With its KAIROS projects, SOKA-BAU initiated a green-field approach for developing and implementing social fund procedures as part of its digitalization strategy. Services and other core processes have been standardized and completely redesigned, taking customers' needs into account.

In the KAIROS projects, teams consisting of internal employees from process and organizational management, customer service, and IT worked with external consultants to develop new products and services.

Technical components:

- Online services and portals as proprietary Java developments
- Process modeling with BPMN in Camunda
- Technical and organizational concepts in Confluence
- Backlog structure and user stories in Jira
- Building click dummies and design prototypes with AdobeXD
- Test automation with Robot Framework

The Project

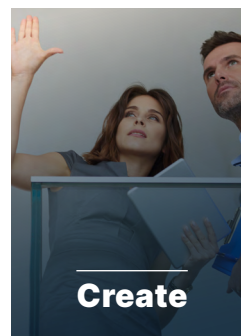
The method chosen for the project was the "Digital Innovation Playbook" from Dark Horse Innovation, an advancement of design thinking and several other approaches.

The playbook was developed specifically for digital innovations and consists of three core modules: **EXPLORE**, **CREATE**, **EVALUATE** (see below). The modules have different perspectives and objectives, but are not strictly delineated from one another. Findings from one module can have impacts on a previous module, which means new solutions are developed iteratively.



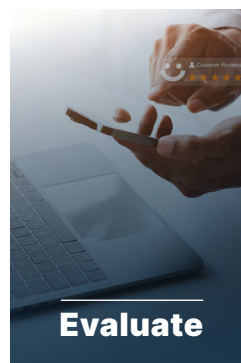
Explore

- Determination of customer needs and current pain points
 - In-depth interviews (qualitative)
 - Questionnaires (quantitative)
- Statistical evaluation of survey results
- Creation of personas
- Prioritization of customer requests
- Derivation of initial requirement



Create

- Creation of a scrum team
- Mapping of requirements in user stories and technical/organizational concepts
- Redesign of selected processes, taking the customer journey into account
- Development of online services and new employee applications with scrum



Evaluate

- Evaluation of new processes and online services with the aid of click dummies and prototypes
- Systematic recording of customer and employee feedback
- Communication of the results throughout the company
- Rapid consideration of feedback for the further development of the services



The Benefits

SOKA-BAU piloted the employer portal with selected customers, who have been involved in the development of the new processes and services since the beginning of the EXPLORE module. The new processes and the new portal are now being rolled out successively to all construction industry employers (around 70,000 firms and service providers).

Manual processing steps have been reduced dramatically through expedient automation. Thanks to individual, proactive communication with the service team since the start of the pilot phase, customer satisfaction has increased significantly.

There are also firm plans for digital services for SOKA-BAU's second group of customers, construction workers. They will be able to get a digital overview of available benefits at any time and submit requests easily on a smartphone. Now that an interactive click dummy confirmed high user interest in these potential services, SOKA-BAU will continue to push forward with this development. Its goal is to provide low-threshold, user-friendly services to significantly increase knowledge about the benefits of SOKA-BAU and the advantages of the social fund procedure among this group of customers.

ABOUT SCHEER

As a consulting and software firm, the Scheer Group supports companies in the development of new business models, the optimization and implementation of efficient business processes, and the dependable operation of their IT systems. A particular focus in the development of products and services involves guiding companies through their digital transformation.

**Do you have questions on these subjects, or would you like to talk with us about specific projects?
Simply send us an e-mail or give us a call!**