Barmenia Gothaer

CCM - From coexistence to collaboration

First upgrade, then restart – or vice versa?



Folien sind zum Teil mit KI-Unterstützung erstellt

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Course of our trip

01 Departure

02 Voyage Overview

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Departure

You will be greeted by the captains...

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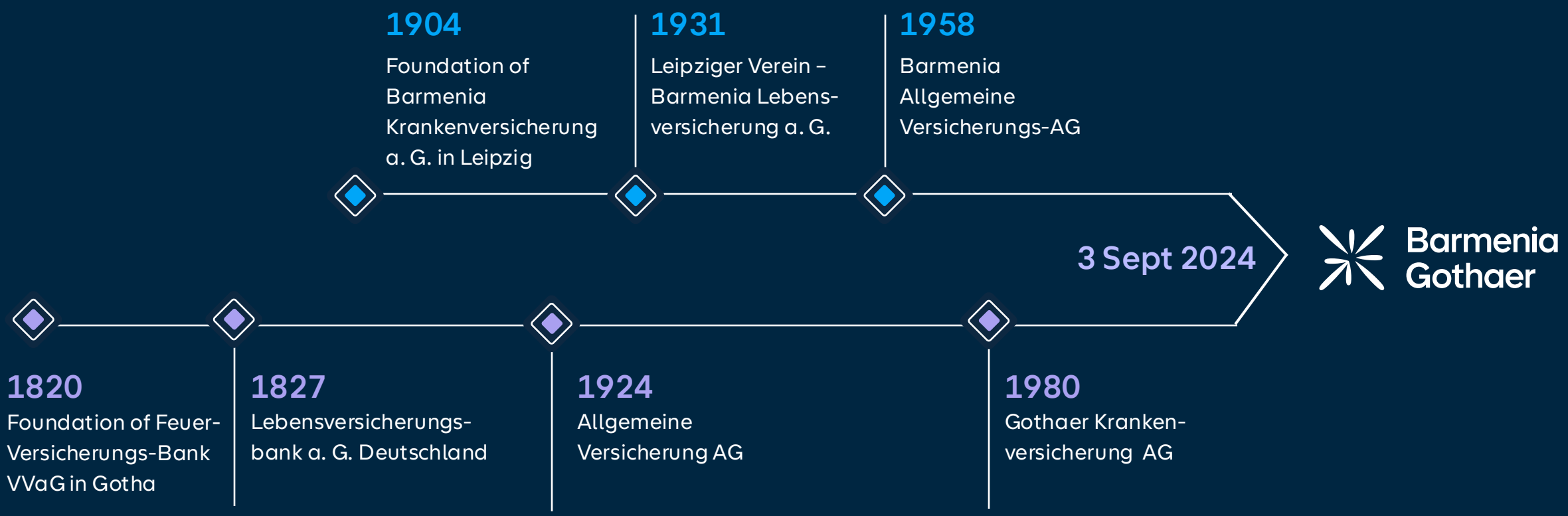
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Departure

... on board the "BarmeniaGothaer"

BarmeniaGothaer is created from two traditional insurance companies



Among the Top 10: Even stronger together

Barmenia Gothaer



8 M

Customers



7.500

Employees



4.700

Partners in exclusive distribution



9,2 bn Euro

Volume of contributions

Our brand values: Inspiring people for BarmeniaGothaer

Partners – without hesitation



HUMAN

We develop the best solutions



PASSIONATE

We are moving forward



ENTREPRENEURIAL



Indicative market assessment based on experience and supported by AI

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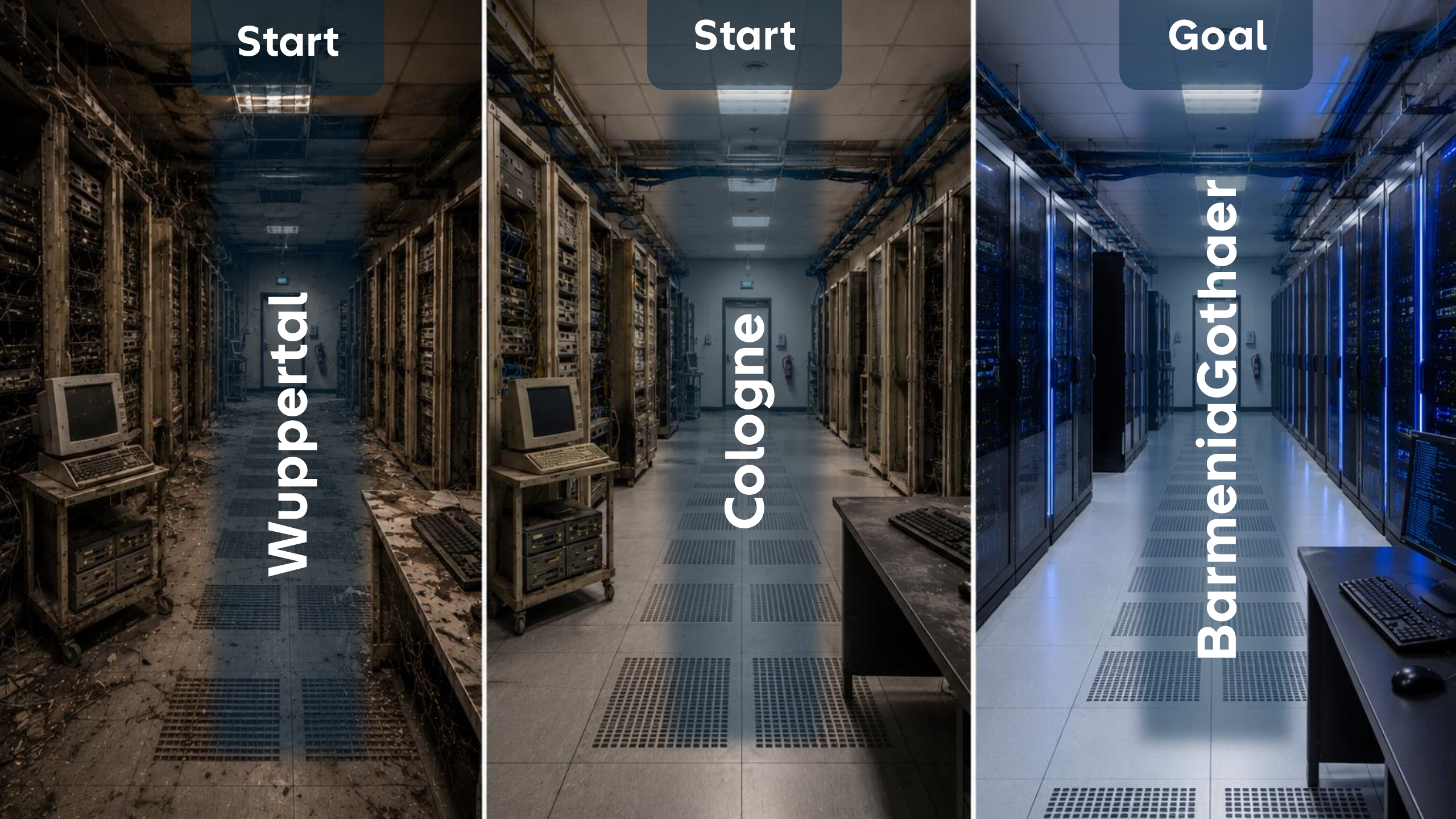
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Start
Wuppertal
Start
Cologne
Goal
BarmeniaGothaer

Port of departure: Wuppertal

Wuppertal: Replacement

1. Dopix and DocBridge Pilot in service since 13 years – still working
2. Compulsion to replacement - End of maintenance Dopix
3. Choosing M/TEXT in combination with DocBridge Pilot
4. Project launch 2024

Duration: Until the end of 2028	Number of online templates : 3567	Number of batch templates: 299



Port of departure: Cologne

Cologne: Migration

1. M/TEXT Classic and M/OMS in use for 10 years - running
2. Mandatory upgrade due to end of maintenance in 2028
3. Migration from Classic to TONIC while remaining M/OMS
4. Project launch 2026

Duration:
Until the end of 2029

Number of online templates: 1817

Number of Batch templates: 111



Port of destination: BarmeniaGothaer

ONE System Wuppertal/Cologne

1. M/TEXT TONIC – Document Creation
2. M/OMS – Output Management
3. ONE unified upstream portal
4. Managed by ONE team

150 Mio. pages/y	3.700 User Editor	50 User Workbench	10 User Content Hub









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Barmenia
Gothaer
Wuppertal
Cologne


Wuppertal
Cologne






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Rough waters
Fusion

Target state. Moving to ONE System for across both sitess despite...

- Different baseline configurations
- Different starting points
- Different processes
- Different business drivers
- Different philosophies





Rough waters
Culture

Target state. Moving to ONE System for across both sites despite…

- Different tools
- Different documentation approaches
- Different levels of stakeholder involvement
- Uncertainly regarding future cross-sites collaboration between departments (across sites)



Rough waters
Constraints

Target state. Moving to ONE System for across both sites despite…

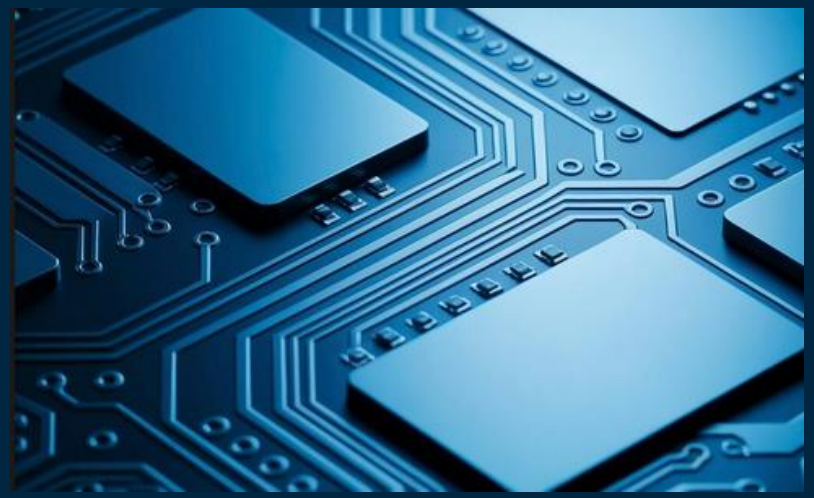
- Unclear priorities
- Competing projects (Accessibility Act, new corporate design, printcenter consolidation, etc.)
- Parallel alignment towards a common target operating model
- Parallel team integration
- A highly compressed timeline
- Significant business-side testing effort that cannot realistically be accommodated



Rough waters
Technology

Target state. Moving to ONE System for across both sites despite...

- New technology stack (Kubernetes Quarkus) ➔ new to both sites
- Different output management systems Outputmanagementsystemen
- Heterogeneous interfaces landscape (no shareddomain interface)
- Undesirable backward integration into legacy systems





Indicative market assessment based on experience and supported by AI

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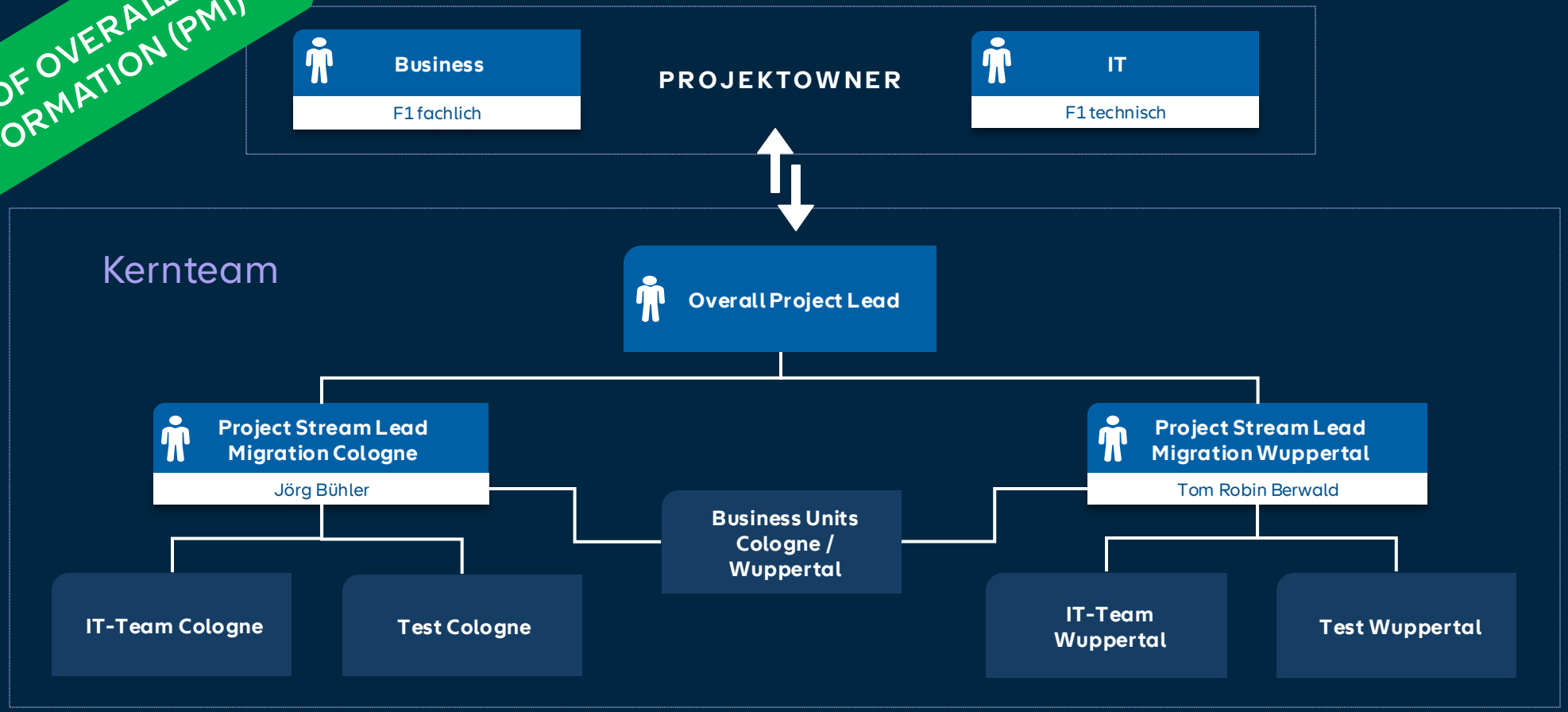
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Organisation Chart → project

SynTex
Eine Textplattform für alle

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PART OF OVERALL TRANSFORMATION (PMI)



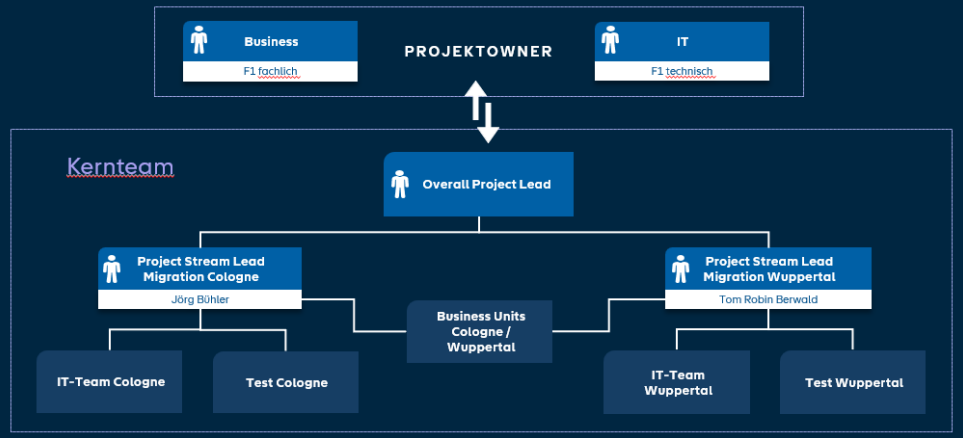
Organisation Chart → project

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Addressed

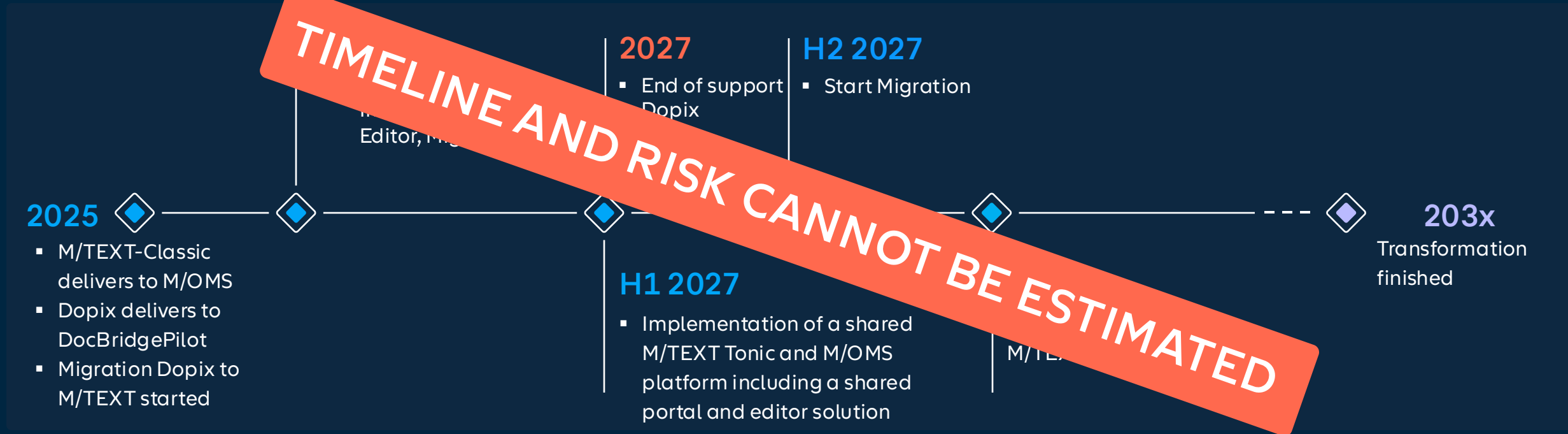
- Start dates synchronized
- Common approach established
- Business drivers aligned
- Cultural alignment progressed
- Tools harmonized
- Processes standardized
- Documentation harmonized
- Consistent stakeholder engagement established
- Priorities clarified
- Competing projects aligned
- Output management system decision made



Navigationsmap 1.0 → rejected

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RESTART



Limited potential for automated migration
Limited potential for automated testing

Time pressure due to the end of support for Dopix
Time pressure due to the end of support for M/Text Classic
Time pressure resulting from other transformation initiatives

Navigationsmap 2.0 ➔ in progress

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COLOGNE

Upgrade

- M/TEXT Classic delivers to M/OMS
- Start Migration Classic to TONIC
- Migration to TONIC finished
- M/TEXT TONIC delivers to M/OMS

2026 2029 2031

2025

Solution alignment required

Consolidation of text systems

Folow-up project: Consolidation to a SINGLE M/TEXT-Instance

2027 2028

- Dopix delivers to DocBridge Pilot
- Migration Dopix to M/TEXT started
- Migration Dopix finished
- M/TEXT TONIC delivers to DocBridge Pilot
- DocBridge Pilot replaced by M/OMS
- M/TEXT TONIC delivers to M/OMS

WUPPERTAL

Phase 1: independent approach

Phase 2: common approach

Navigationsmap 3.0 ➔ in progress

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COLOGNE

Hybrid

2025

2026

- M/TEXT Classic delivers to M/OMS
- Start Migration Classic to TONIC

2027

- Dopix delivers to DocBridge Pilot
- Migration Dopix to M/TEXT started

2028

- Migration Dopix finished
- M/TEXT TONIC delivers to DocBridge Pilot

2029

- DocBridge Pilot replaced by M/OMS
- M/TEXT TONIC delivers to M/OMS

Continuous architecture alignment

Consolidation of text systems

2031

- Migration to TONIC finished
- M/TEXT TONIC delivers to M/OMS

Follow-up project: Consolidation to a SINGLE M/TEXT-Instance

WUPPERTAL

Phase 1: independent approach

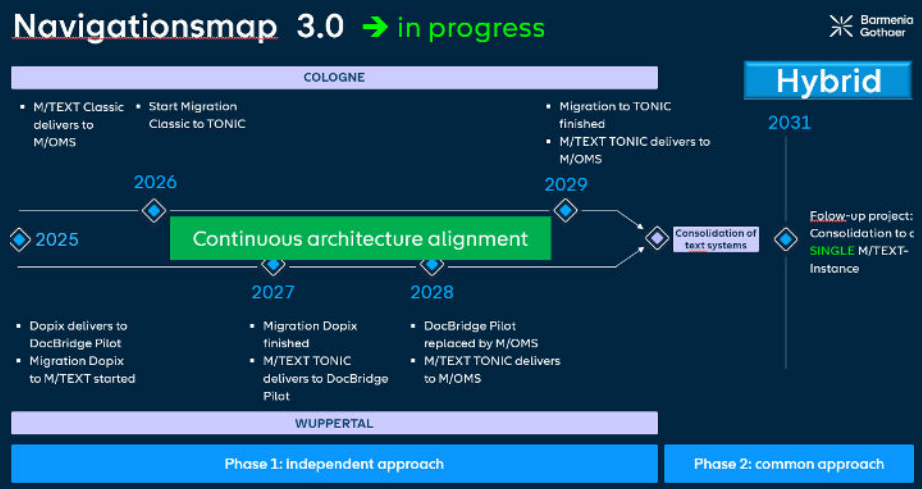
Phase 2: common approach

Navigationsmap 3.0 ➔ in progress

Addressed

- Shared target vision established and continuously maintained
- Timeline remain challenging but are manageable
- Collaboration is delivering tangible synergies in
  - ✓ Migration and
  - ✓ Test

- New technologies can be aligned
- Technology philosophies can be aligned
- Interface remain fully in focus
- Site-specific requirements are accommodated through the separate implementation approach



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Current status:

1. Wuppertal:
   a) Batch: Riester migration completed and live in production
   b) Online: 300 of 3800 documents currently in testing
   c) Standardized testing approach under development

2. Cologne:
   a) Framework migration 80% completed
   b) Portal migration 80% completed
   c) Planning for manual and technical migration in Q4 underway
   d) POC: Automated testing via AI verified
   e) Technical proof of concept for digital accessibility (BFSG) completed



Arrival & Outlook

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Key learnings:

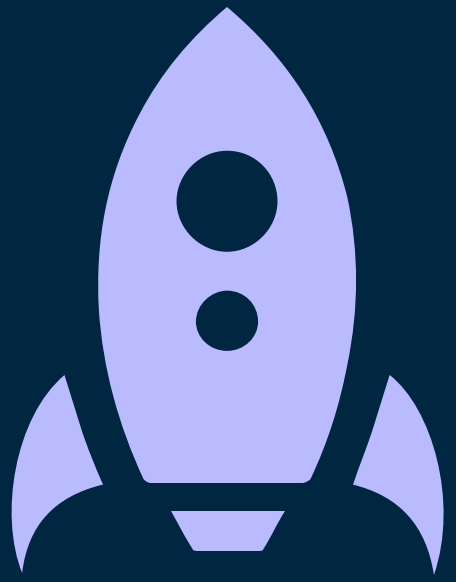
1. Starting with batch products is not optimal
2. Starting with highly complex products is not optimal
3. Migration requires multiple iterations in the early stages
4. Testing effort remains extremely high despite automation – **Solution: AI can reduce it up to 80%**
5. The merger places significant demand on resources
6. Success is only achievable with substantial external support
7. Planning is highly complex; a hybrid approach is optimal when applied selectively



Arrival & Outlook

The journey continues:

1. Phase 1: establish a common technology foundation for both sites
2. Phase 2: consolidate both system landscapes into a unified platform
3. Our collaboration drives project success, while the project further strengthens collaboration
4. A hybrid approach enables us to combine upgrade/modernization and transformation



„THIS IS THE WAY“

Thank you

Please feel free to reach out if you have any questions

