

# THE NORWEGIAN STATE EDUCATIONAL LOAN FUND

EFFICIENT CASE MANAGEMENT AND EXCELLENT CUSTOMER SERVICE WITH PUBLIC 360°

To reach their goal of becoming one of Norway's most cutting-edge public bodies, the Norwegian State Educational Loan Fund needed a future-oriented application for online and automatic case management. Software Innovation's case and records management application, Public 360°, plays an important role in the realization of one of the biggest and most exciting IT projects in Norway.

The Educational Loan Fund aims to become one of Norway's most up-to-date public organizations. One of the country's largest IT projects was launched as a major step in realizing the goals laid out in a governmental report from 2004. The development project aimed to ensure the implementation of a new case management system based on the latest technology. The main objectives were to increase the level of self-service and automation of processes and to introduce efficient working processes adapted to the chosen systems. Secure applications were required to underpin the Educational Loan Fund's organizational procedures, while being both cost efficient and stable.

In addition to this, it was important for the Educational Loan Fund to procure an application that created flexibility and capacity for customizations to meet changing regulatory frameworks, while satisfying legal, security, accessibility, and quality requirements. A final crucial aspect was the need to be able to use standard applications wherever they would be cost efficient in relation to the life cycle of a system.

"For a lot of young people, the Educational Loan Fund is their first encounter with a public body. That's why it's extremely important that they are met by a professional, fast and service-focused approach. In this way we are part of 'educating' and delivering eCitizens to the rest of the public sector – this sets high demands for an innovative approach to customer-centered technology."

*Morten Ødelien, Organizational Architect at the Norwegian State Educational Loan Fund*

**A million cases each year**

With 150 case handlers, the Educational Loan Fund currently processes over one million cases each year. With more than 40,000 communications with customers every day, in the

**Product:** Public 360°  
**Sector:** Governmental Organization



## About the Educational Loan Fund:

The Norwegian State Educational Loan Fund was founded in 1947 and since then has administered financial support to Norwegians wishing to complete further education. Its organizational aim is to enable access to knowledge and equal opportunities to education, as well as upholding satisfactory working conditions. The Education Loan Fund adheres to regulations laid out by the Norwegian Department of Education and Research, regarding the distribution of educational support and commerce, the repayment of loans, and the loss of rights to funding.

The Educational Loan Fund currently has approximately 900,000 active customers, which equates to around 20% of the Norwegian population. €2.2 million is distributed annually as financial support for 300,000 students, while 550,000 people are in the process of repaying study loans equating to over €1 billion per year. The organization has 320 employees across six offices and handles over a million cases each year. The Educational Loan Fund is in essence one of Norway's biggest banks.

**The Educational Loan Fund uses Public 360° for:**

- Case Management
- Records Management
- Automatic and manual document production (Microsoft Word)

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form of emails, payments, decisions and letters, it is vital to have top quality IT tools that enable fast case management, efficient automated processes, self-service and high quality customer interaction.

“The measures taken over the past years have halved our case handling times, from an average of sixteen to eight days. The number of telephone enquiries has dropped from 1.5 million to 450,000 annually, allowing us to reduce our man hours by 16%. We have obtained a savings of €650,000 every year across the past five years, reduced sick leave for our employees and, more importantly, have increased our levels of customer service,” says Morten Ødelien, Organizational Architect at the Educational Loan Fund. “Over 60% of the student enquiries are now dealt with automatically within 24 hours. The online application quota was 100% in the 2009-10 academic year.”

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## The need for a standard application

The Educational Loan Fund has had a mainframe environment since 1985, developed and maintained by an in-house IT department. The IT application was tailor-made for them over a long period of time, had low downtimes and users were satisfied. However, over time, there were fewer and fewer people with expert knowledge of the internally built system, alongside a growing need to acquire a new and more up-to-date application. The mainframe is today run in tandem with the implementation and development of new applications.

“To meet the requirements of the government’s decision about new IT systems, we chose to procure a standard solution with Service Oriented Architecture (SOA) and a simple configuration,” says Ødelien. “This allows us to bring different modules and systems together, which can be accessed through a common interface. We also wanted to lay the foundation for even better collaboration with educational institutions. The aim was to choose applications that would support us in our desire to become one of Norway’s most cutting-edge public bodies.”

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## About Public 360°:

Public 360° is a leading application suite for Case, Document & Records Management for public administrations, built on Microsoft SharePoint and Office. Public 360° enables efficient and transparent digital administration, collaboration and citizen services and includes a variety of packaged business solutions for public administrations.

The Educational Loan Fund began procurement of a new customer and case management system in 2008, following a governmental report from 2004 regarding the modernization of the Educational Loan Fund, including the replacement of their IT applications. Software Innovation was chosen as a subcontractor for implementation of the Public 360° application.

## Choosing Public 360°

Public 360° is an important component within the larger business application, which together create a complete, up-to-date system for online and automated application management, based on Microsoft products.

“During the procurement of a new and modernized IT solution, we were also choosing a standard solution for case and records management. We chose Public 360° from Software Innovation,” says Ødelien. “Public 360° meets the strict national records keeping and archiving standards, as well as meeting the demand for future-oriented, adaptable case management, secure records management and document capture and efficient collaboration.”

Public 360° has a logical data model that can be expanded modularly and in phases and can easily be configured to suit different case types. In addition, the application has a simple user interface built on Microsoft SharePoint, which allows employees to work efficiently in familiar environments such as Microsoft Office and Outlook.

## A more efficient workday

The Educational Loan Fund deals with approximately 100 programs that are managed as defined case types. The aim is for the process, from application to result, to be as automated as possible and untouched by case managers – these are so-called ‘routine cases’. These currently make up 60% of all of the organization’s cases. The remaining ‘non-routine’ cases are reviewed and managed manually by case handlers in the Public 360° interface.

“In Public 360°, case handlers have customized, role specific work spaces with a clear overview of the status and progress of cases. Contact information, documentation from customers and third parties, customer cases and documents are gathered in one place, with fast and easy access for case handlers,” says Ødelien.

“Smart functionality increases the efficiency of the processes linked to case management and reduces the amount of time used on repetitive tasks. For example, cases can be distributed easily and managers have a clear overview of case statuses and workload distribution.”

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## Self-service

One of the aims of the new application is to increase the availability of self-service for applicants to the Educational Loan Fund, meaning that most case management happens automatically. The online application in the ‘Your Pages’ section of the customer portal allows users to apply online and receive electronic responses – often without involving a case handler at all. The applicant can log in at any time to see the status of their application and see a summary of their loan amounts, repayments and other details. The information registered by the customer in ‘Your Pages’ is synchronized and saved automatically in Public 360°.

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“This generation of students has grown up with the internet and an understanding of ICT. They have greater expectations for technology and online services than their predecessors. We have seen both existing customers and new customers extremely happy with the online customer portal, the case management and the handling of education finances,” says Ødelien.

**“It’s admirable how efficient the Educational Loan Fund has become by building a functional online system. I applied for a payment extension yesterday and received a response with a decision about it in my mail box today. It was a really impressive handling time and an excellent response service.”**

*Feedback from a satisfied customer*

**The technology behind the Educational Loan Fund’s IT project:**

Public 360° case and records management is integrated with a complete system compiled from Microsoft-based products:

- SOA Software for SOA governance
- BizTalk for workflow in automated processing
- InRule business rules engine
- Internal workspace based on Public 360° in Microsoft SharePoint and Office
- Microsoft .Net platform
- Scanning system in Nets with records kept as cases in Public 360°
- CTI call center system
- A range of business systems for educational institutions
- Mainframe solution that runs parallel with the new system during the development phase

**Why use Public 360° at the Norwegian State Educational Loan Fund?**

- Standard functionality for case, records, task and contact management
- Open web service-based integration capacity that enables automated processes and self-service
- Configurability, meaning that the standard application can be customized to suit the organization (in terms of case types, metadata, functions)
- Smart document management (integrated with Microsoft Office)
- Simple and intuitive user interface that can be customized for different roles and needs
- A complete case and records management system that meets the strictest national regulations for archiving and records keeping



Software Innovation is a Scandinavian company and a leading international software vendor for document control, information and case management. With 25 years of experience and competence in business-oriented content applications, we are committed to delivering future-proof, flexible and highly user-friendly solutions for our customers and partners. Our application suites create excellent information sharing, efficient collaboration, business control and improved service for both private and public organizations. The packaged business solutions are built on Microsoft SharePoint and Office, the market leading platform for collaboration and business productivity.