
Establishing effective meetings with Sherpany: the case of Helvetia's ExCo



About Helvetia

With over 160 years of experience and more than five million customers, Helvetia is a leading Swiss insurance company. This group offers several products to SMEs and private individuals and it's currently also present in Germany, Italy, Spain, Austria, and France.

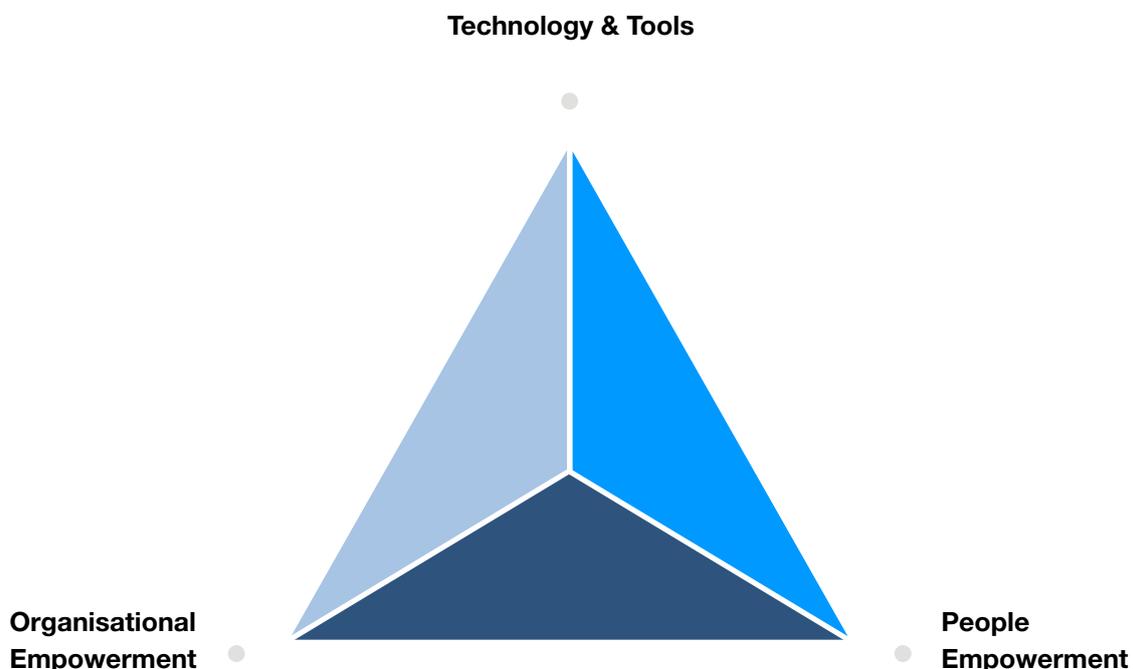
Helvetia adopted Sherpany's executive and board portal to improve its board of directors and executive committee meetings. In this case study, we had the pleasure to talk to Mr Pascal Buehler from Helvetia's Group CEO Office, about the experience of the executive committee.

To know more about Helvetia, [visit their website.](#)

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71% of senior managers said **'meetings are unproductive and inefficient'**.¹ The striking number from Harvard Business Review makes us wonder: are companies empowering leaders with the necessary tools and processes to drive effective and productive meetings?

Helvetia Group certainly is. The Swiss enterprise supports its leaders with the **right technology and processes, which empower the people** to drive meeting effectiveness - all three necessary dimensions of the Sherpany model (see image below). By embodying these elements in their meeting culture, Helvetia was able to improve their leaders' individual preparation for executive committee meetings, since they can now create annotations and edit documents on mobile devices, even offline - this led to an agile preparation for meetings. Furthermore, Sherpany's software allowed a quick and comprehensive view of all the topics within a simple meeting structure. How did they do it? Read on to find out.



As a first step in making their meetings more effective, Helvetia's executive committee opted for a collaboration software. They were able to exchange more information and improve cooperation among attendees. Yet, as highlighted by Pascal Buehler from Helvetia's Group CEO Office, **'There is an issue with inefficient meetings, especially in higher hierarchy levels,'** which required them to take a step further in their digital journey and find a tool that fits their needs 100%.

Why is it crucial to choose the right software?

Leadership teams have specific needs when it comes to meetings and a tool focusing only on collaboration **'was not reflecting the meeting process well enough,'** explains Mr. Buehler. For the management team, it was crucial to be always aware of last minute changes and for the meeting administrators, to minimise the risk of errors during the entire meeting process.

What really made them realise they needed to take a second step in the digitalisation of their meeting process was the time waste. Administrators were still investing too many hours in preparing meetings, while participants could not edit documents or create personal annotations on their mobile devices. The executive committee members had to be in front of a PC to read, annotate, learn, and process all the documents received - not easy when you are constantly 'on the go'. It was time to find a solution to improve the effectiveness of their leadership meetings.

The road to meeting effectiveness

Helvetia's executive committee decided it was time to change providers and take their meetings to the next level. It took them only one meeting to completely move away from their previous software to Sherpany. They described the process as 'smooth and easy' and the support provided during the onboarding period was 'very good'. Mr Buehler told us that they felt 'well escorted' and we could also learn how important it is to offer a detailed onboarding and to be close to the meeting administrators when doing the transition. As we all know the devil lies in the details and the user group is not very 'error-accepting'.

The first sign of increased productivity was less manual work for the meeting administrator and also the easiness he found when establishing a standard process for executive committee meetings', without having to go through workarounds per member when needed. **'This is the basis for higher efficiency and thanks to Sherpany, we are on a good path.'** Pascal Buehler also highlights the benefits of organising meetings, uploading, updating, and distributing.

documents with one single platform ‘it takes away the risk of making mistakes’ and the good reaction time of our support team: ‘There is always a helping hand available.’



‘This is the basis for higher efficiency and thanks to Sherpany, we are on a good path’

— **Pascal Buehler**, Head Group CEO Office (Helvetia)

The executive committee members enjoy now the benefits of preparing meetings anytime, anywhere since the software is available on the web environment but also as an app for iOS, Android, and Windows devices, allowing participants to prepare their meetings conveniently. Our executive and board portal navigation allows them to **quickly find any information they need** and **what decisions were made in past meetings**.

In short, this is how Sherpany’s executive and board portal improves the effectiveness of the executive committee meetings:

- **Improved individual preparation** for meetings;
- **Faster and more efficient organisation** of meetings;
- **Simple storage of documents;**
- And **efficient navigation** topped with an **integrated search tool**.

Helvetia found a partner for their executive committee meetings that is willing to improve and invest in innovation continuously to keep their leadership meetings effective, efficient, and timely.

Sources:

1. Leslie A. Perlow, Constance Noonan Hadley and, Eunice Eun, “Stop the Meeting Madness”, Harvard Business Review, 2017

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