Shared Services Arm of Major European Insurance Group Reduces Processing Time by 80% with Automation

Customer: Shared services arm of a large European insurance group
Processes automated: Core insurance processes

A shared service provider, part of one of the largest insurance groups in the world, delivers policy, fund administration and other services to other corporate entities in the group.

The service provider decided to employ Enate's orchestration platform and, afterward, the robotic workforce by UiPath in 2017, to streamline operations and deliver more value-added services.

With 14 processes automated, the company reduced processing time from five minutes to just 20 seconds, doubled the number of transactions, while its employees embraced the transformation.

"The energy level amongst our people on the service teams has completely changed, people are happier, we now measure the service in terms of compliments." – CEO, Shared Services arm of large European insurer

Key benefits

56%

reduction
in incoming Email resolution time

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38%

reduction
in incoming phone call volumes, despite an increase in transaction volumes in the same time frame

Too many emails, too little time

As with most financial services companies, email-based processes with little oversight put tremendous pressure on this shared service operation. The insurance-centric tasks involved Excel spreadsheets tracking and consistent communication to and from all the parties involved in handling processes, employees, brokers, and customers. Using input data from multiple sources: emails, phone conversations or scheduled activity from pre-existing applications and systems also made matters more complicated. The company needed greater control over the operating environment and also to determine capacity. With increasing overtime threatening to disrupt employees' work satisfaction and efficiency, the service provider had to tackle the challenges full on.

They understood that automation was the right solution but needed to find the 'sweet spot' of each workflow where a robot could take over.

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>
> Kit Cox — CEO of Enate

The right solutions at the right time

Finding a tool that brought visibility and control over how operations were running was the first necessary step. To get an overview of all the processes that burdened its employees and the center's efficiency, the company selected the orchestration platform provided by Enate in May 2017. Next, it rolled out a Robotic Process Automation (RPA) implementation at the end of 2017.

In the words of Kit Cox, Enate's CEO: "The whole principle around this type of orchestration approach is that you get data coming out of Enate that gives you the direction and tells you: 'We're now measuring what people are doing.'"

Enate was also able to connect all the different communication legacy applications the organization used in day-to-day operations. First, it orchestrated the company's delivery and management of services by human employees, mapping processes, their rules and data streams to give insight on which steps had potential for automation.

The company realized that Robotic Process Automation was the next natural step. One key element was learning from the group's previous implementations, as well as performing a cost-benefit analysis before getting started. Picking the right process was important but automating it to deliver a clear value back to the business was crucial. The service provider's CEO adds: "What's the real purpose of actually implementing something? You've got to have facts and figures supporting it. So, if you don't walk into it with your eyes open, you're going to end up where a lot of companies have gone with RPA: they fall flat because they haven't actually done a proper cost benefit from the start."

Once Enate's orchestration platform took control of what, where, when, and why the company's resources worked the way they did UiPath Robots were brought in to identify how to take over the workload. The two solutions combined (backed by an existing technology

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Kit Cox — CEO of Enate

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CEO — Service Provider in large European insurer

partnership) handled the company's existing demand and available resources—both human and robotic—to deliver the best possible service level agreement (SLA) performance to customers.

The integration, in a nutshell, will allow existing Robots and environments in the UiPath Orchestrator to populate Enate's platform as part of a future deployment. An Enate activity library in UiPath Robots gives the Enate orchestration platform the ability to assign the free robot to a particular task. Kit Cox explains: "Enate's got the information about what needs doing and when it needs doing, and the Robot, just like a person actually, has to say, 'I'm free. What shall I be doing?' Our two teams of geeks have worked nicely together to make that super simple."

Getting started with automation

The service provider performed an analysis on existing RPA providers, but UiPath stood out right from the start due to its close relationship with Enate, which made the integration smoother and more effective.

When selecting the best processes for automation, the company looked at the steps that were manual, re-petitive, system-adjacent, which allowed two different applications to work together, and with read-only access. For now, the company has only looked at processes that were less risk-averse, but with a good potential to deliver benefits to both the business and customers.

Educating employees on what RPA implied was crucial to secure their support. Robots were not being employed to take their jobs but to help them perform more value-added tasks. Instead of humans doing reconciliations, post-implementation, they would have more time to spend talking to brokers. The company's CEO adds: "We spend more human time with our customers than we would have previously in the past. So that's a really, really important thing to do if you're looking at bringing in robotics." To make RPA more approachable, the first UiPath Robot was given a name, Sparky, and whenever a

Key benefits

80%
reduction
in internal processing time

—

70%
reduction
in end-to-end cycle times

—

23%
improvement
in SLA for Front Line Phone calls – from
73% to 96% year-on-year

—

75%
reduction
in overtime despite unprecedented 2018
weather events

new process was automated, the implementation team filmed a demo documenting it and showed it to all the employees. The RPA developers went through partner-led training sessions, and then were enrolled in the UiPath Academy.

Besides reconciliations and surrenders, the company investigated other processes that involved data transfer using Tableau Reporting, as well as its in-house management information system and other group-specific underlying applications.

Next, they created a small RPA Center of Excellence (CoE) comprised of a team of individuals to focus on both system improvements and automations. The team analyzed the benefits realization of all the processes automated each month. "I get a report every month showing me each of the processes we now have in robotics, and what that's delivering for me all the time. It's not just a one-off hit; it's cumulative the whole time. So, it's worth tracking that the whole time," said the company's CEO.

The implementation time for each process has also been streamlined, from approximately one month to less than two days if the code only has to be modified for a new particular task. Kit Cox adds: "That kind of timescale, yes, it has to do with complexity, but it also has to do with how focused you can be and how easy it is to slice out the process that you want to be able to have the robot to do."

It was also crucial to have separate teams handling the Enate orchestration platform and the UiPath Robots. However, the change management function within the company allows interaction between them, business, and IT. Currently, the company has 14 automations. The teams have a list of 20 to 40 processes but go through each one at a time to make sure that there is enough capacity in business and operations to meet the demand.

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CEO — Service Provider for large European insurer

Next steps

We are here to provide you with more information, answer your questions, and create an effective automation experience for you.

Contact our sales team

Check out our YouTube channel for product overviews, demos, and UiPath conference highlights, and to hear from our founders and leadership team.
www.youtube.com/user/UiPath

Reaping the rewards

After a rapid implementation, the service provider's employees were the first to reap the benefits. They were able to issue service requests and report on all service areas quickly and efficiently, without repeatedly contacting brokers to receive the correct information. The company achieved 80% reduction of internal processing time, as well as considerable improvement in customer satisfaction and net promoter scores.

For example, a process that required employees to talk to brokers on the phone to locate particular transactions used to take five minutes. To perform each search, employees also had to open a number of emails which could be found in up to eight different mailboxes, while also minding the brokers who were on hold. With Enate and UiPath, the same transaction can be finished in merely 20 seconds because all the mailboxes and systems are centralized. This allows employees to enhance each phone interaction and deliver more services to brokers.

A particular process that was previously taking 24 days per transaction, once automated with UiPath and Enate only took an average seven days. It not only saved time to process, but the transactions have doubled. There lies the solutions' immense efficiency.

One year later, the company has seen potential in sharing its newly-adopted technologies with other group entities and corporate customers and has engaged them into being open towards automation. As soon as the company adopted the orchestration tool from Enate, it added a noticeboard with appreciation messages from customers and brokers. Now, after adding UiPath Robots to the mix, the insurer's service provider has three boards, and the CEO adds: "We've got three boards now with feedback from brokers. They're happy, and the people on the floor, in the business here are happy as well. It's a win-win benefit."