

Business Process Automation (BPA) Implementation for an Insurance Company

Our team was engaged by a Fortune 500 insurance company for management consulting services. The company's legal department's approach for engaging with nonpanel law firms used manual, inefficient processes that led to long cycle times, lost requests, and employee frustration. Users were required to fill out a form created in Microsoft Word to collect information, such as contact details, line of business, specialty, reason for exception, etc., and submit them to a central mailbox. Resources then manually distributed requests to individuals, which was prone for error and often resulted in delays if the mailbox wasn't checked frequently.

The management consulting team conducted an end-to-end process assessment to identify what could be optimized and/or automated, and then built a custom workflow using Onit's business process automation platform, Aptitude. Direct enhancements included:



Transforming Word forms to web-based forms leveraging required fields, standard formats, and dropdown selections



Replacing the central mailbox with business rule-driven routing and approvals



Implementing an open request reminder protocol



Creating dashboards to provide users with real-time updates on status

As a result, the legal department gained extra capacity enabling attorneys, paralegals, and staff to focus more on higher-value work. It also increased visibility into request volumes, request types, and cycle times, and enabled them to define standard service-level agreements with their business partners.