



Efficient Value-Driven Automation through Process Reference Model

Summary

A Global Insurance Organization sought a systematic approach to standardize and analyze various processes for the purpose of implementing automation software. These processes encompassed Sales, Client Onboarding, Policy Servicing, Fiduciary, Placement, and Claims. Scheer Americas efficiently responded by enabling their journey using its Value-driven Business Process Management methodology.

A Target Operating Model was devised, outlining the processes requiring the creation of "To-Be" processes in the repository. The "To-Be" processes identified the tasks to be automated by the software and served as Reference Models, ensuring consistent execution across multiple countries in Latin America, with allowances made for country-specific variations.

Organization Background

The organization is the world's leading insurance firm, offering a wide range of services globally. Its Latin America (LAC) branch, with over 500 facilities in countries such as Mexico, Brazil, Argentina, and others, is a prominent player in the region. With a strong workforce and comprehensive services, including risk management and investment advisory, the LAC

branch is trusted for its exceptional service quality and customer-centric approach. Dedicated to meeting the diverse insurance needs of clients across Latin America, the organization's LAC branch plays a crucial role in the region's insurance landscape.

Business Challenge

In order to establish the Reference Models, the organization systematically captured task-level details of processes from each region. This foundation allowed for the identification of automation and standardization opportunities. The resulting automation opportunities were then documented in the Reference Models, which served as clear instructions for the software vendor. These models helped streamline the automation project and ensure it met the organization's automation needs. The organization's approach involved

capturing task-level details of processes from different regions to create the Reference Models. This comprehensive foundation enabled the identification of potential areas for automation and standardization. The resulting automation opportunities were then meticulously documented in the Reference Models, providing the software vendor with clear instructions on how to proceed with the automation project. By leveraging these models, the organization was able to streamline the automation process, ensuring it aligned with the organization's automation requirements and objectives.

The Solution

The organization took a meticulous approach to define the scope of the project for establishing the Reference Models. In-depth interviews were conducted with Business Process Owners (BPOs) and technical leads to thoroughly understand the Target Operating Model (TOM). This involved utilizing a comprehensive BPMN 2.0 methodology, ensuring that all aspects of the project were carefully considered. The result was the development of over 100 "To-Be" Reference Models in the repository, covering all six business areas of the organization.

Within these Reference Models, hundreds of tasks were identified as potential automation opportunities. This was achieved through the use of specific attributes within the tool, which allowed for efficient and effective identification of tasks suitable for automation.

This comprehensive approach made it simple to communicate the automation requirements to the software vendor, ensuring a clear and organized roadmap for the automation project.

The organization's attention to detail extended to addressing country-specific variations. In instances where divergent paths were identified due to country-specific differences, these variations were included in the Reference Models. The relevant country was specified in the model, ensuring that the automation project took into consideration the unique requirements of each country. This approach ensured that the resulting automation solutions were tailored to the specific needs of each region, maximizing the efficiency and effectiveness of the automation project.

Results

The project was successfully completed, yielding the following outcomes:

- Roles were clearly defined, providing clarity and transparency in responsibilities within the process.
- The models effectively identified automation needs, providing a clear roadmap for discussions with the software vendor on out-of-the-box capabilities and custom automation.
- The Reference Models harmonized processes across multiple regions, promoting a more standardized and efficient manner of operation.
- Regional variations were incorporated into the Reference Models, allowing for necessary flexibility within the regions while still upholding the overarching standardized process.
- The Reference Models now provide a basis for conducting high-level benefit analysis, including evaluations of capacity release, hard savings, and decommissioning of legacy systems..

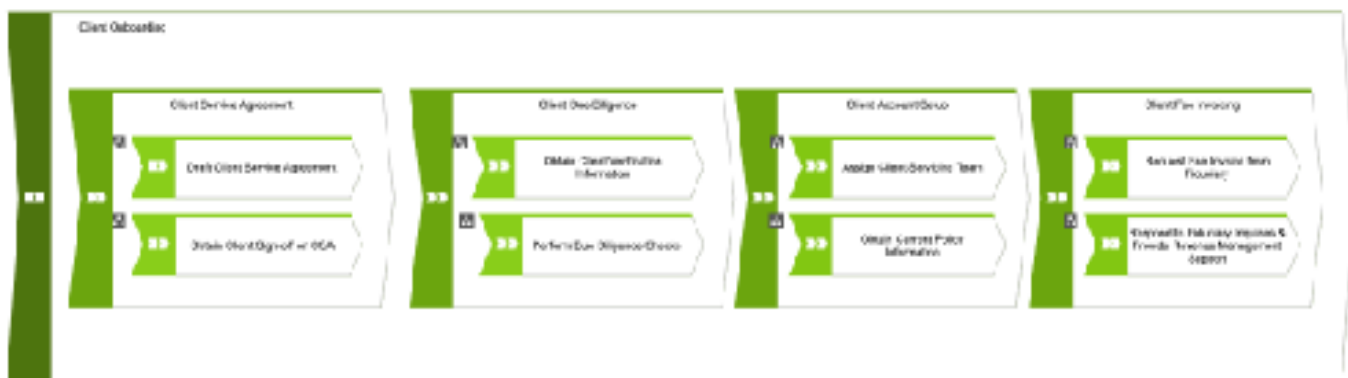


Figure 1: Example of a Target Operating Model.

Do you have questions on these subjects, or would you like to talk with us about specific projects? Simply send us an e-mail or give us a call!

Dr. Mathias Kirchmer | Managing Director | Mathias.Kirchmer@scheer-group.com

Website: <https://www.scheer-group.com/americas>