Scheer

Process Improvement and set-up of a Process Discipline in preparation of a Digital Transformation

Summary

A national title insurance organization used our Value-driven Business Process Management methodology to analyze and standardize their Direct Title Operations processes. The initiative included capturing existing processes, improving them through analysis, defining a "To-Be" state for core processes, creating a BPM Playbook and Roadmap, and conducting BPMN training.

As a result, 104 processes were documented, and global design models were developed for optimized future processes to enable standardization. The work on the title processes and the set-up of the BPM discipline are in preparation of the future digital transformation initiative of the organization.

Organisation Background

The organization is a reputable and established leader in the title insurance industry. With a rich history spanning over a century, Old Republic Title has been dedicated to assisting Americans in safeguarding their property rights, while ensuring peace of mind for one of the most significant investments that homeowners make.

The company fosters close partnerships with title agents, real estate professionals, lending institutions, and industry experts to facilitate secure and efficient real estate transactions. Old Republic Title offers a comprehensive range of title and escrow products and services catering to the needs of individuals, businesses, and government entities. The organization is looking to standardize its operational processes and implement a new digital transformation to streamline the processes.

Business Challenge

To standardize the Direct Title Process, a meticulous approach was taken to gather detailed task-level information from each region using a systematic approach. Data was collected, documented, and analyzed to identify patterns, trends, and opportunities for improvement and automation. This approach ensured a thorough understanding of the process and provided a solid foundation for enhancing consistency and efficiency across regions.

The Direct Title Process will be improved with the assistance of the IT Operations team, and a centralized enterprise platform is being designed for enhanced global efficiency. Implementation is planned in the near future, with scalability and adaptability in mind. Continuous monitoring and feedback loops will optimize performance, reflecting a commitment to driving innovation in the process.

The Solution

Interviews were then held with the Process Owners and Subject Matter Experts (SMEs) to fully define the in-scope, As-Is landscape through detailed BPMN 2.0 models. In parallel, an issue register was maintained, documenting current pain points and improvement / automation opportunities.

Once the As-Is Processes had been signed-off by SMEs, three analysis approaches were deployed:

- Value-add – maximizing value from critical activities, streamlining non-critical.

- Problem-based – addressing stakeholder concerns and improvement suggestions that highlighted system integration.

- Automation redesign – where can the business be restructured to maximize automation opportunities.

Based on this analysis, To-Be process models were designed to represent the Global standardization as well as division variants. The Tile Process Realization of these To-Be processes improvements are grouped into Automation and System Integration Improvement Opportunities. The models were reviewed with both SMEs and IT to ensure alignment.

Results

A compelling, fully costed business case that yielded the following benefits:

- Immediate business impact: a clear road map for how to achieve the desired reduction in manual effort, scalability, and efficiency through appropriate To-Be processes, e.g. for title operations.

- Documented process modelling and management best practices that can be leveraged in future process improvement and transformation projects.

- Achieved a Standardized view of the four core processes were designed for future automation.

- Established a Business Process Management (BPM) Playbook to define the usage of the digital repository in alignment with organizational strategy.

- Defined a future BPM Roadmap with Improvement Opportunities.

- The detailed analysis prior to development improves the efficiency, effectiveness and compliance of the operations.
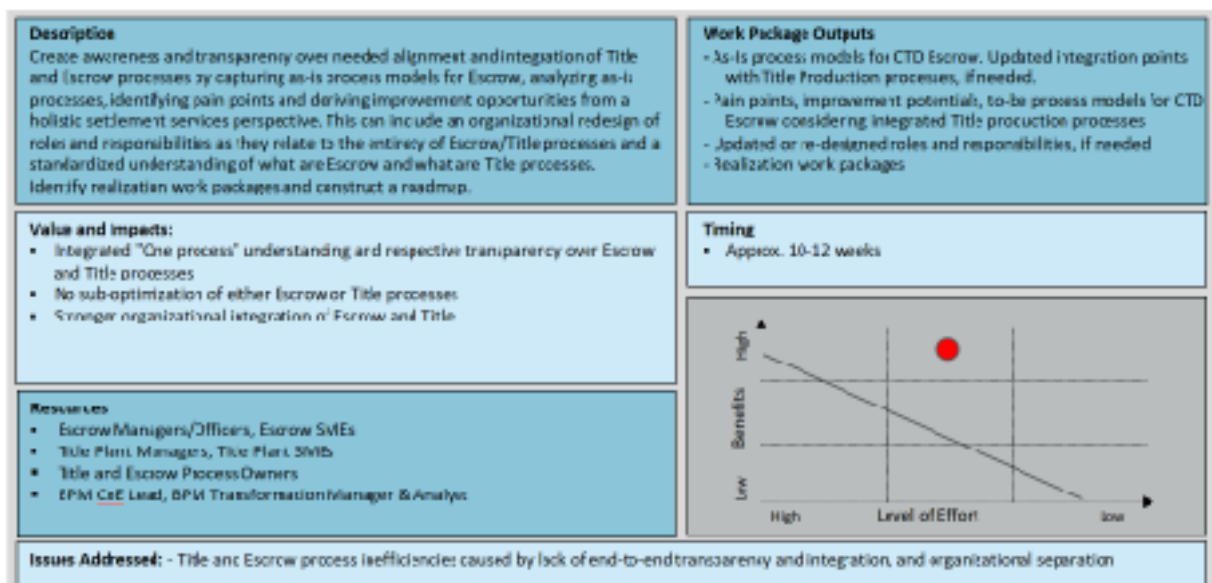

Figure 1: Example of designed Work Package to drive Business Transparency