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Automation at scale

## for a financial services major

Case study

Overview

Our client is a South African financial services group and the largest insurance company in Africa, with diversified businesses across insurance, asset management, wealth management, and investments. The client was struggling with increased costs, dissatisfactory service, and complex manual processes. We helped our client implement and scale the automation across different business units and functions, resulting in reduced manual efforts, improved customer services, and reduced average handling time by **40 percent.**

Challenges and goals

Our client was struggling to **reduce costs** in its client center operations and **improve customer service** for its insurance customers. With complex legacy systems, improper documentation, broken processes, and high attrition across its customer center, the client wanted to boost productivity, improve process efficiencies and increase the throughput.

The client was aware that automation would be the way to address these challenges; however, they were still not clear about how they would scale the automation across different and many processes, business units, and geographies. The client needed a partner to help them test the automation feasibility, build the business case for automation, select the right platform, actually implement automation, and then scale and support it.
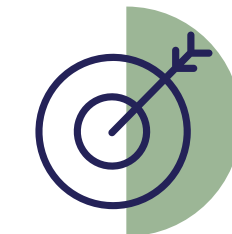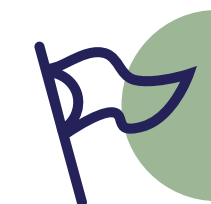
Solution

We embarked with our client on an automation journey to help them solve their problems related to increased costs, business process inefficiencies, and inaccuracies.

- We first did the automation POC with them and helped them choose the right automation platform.
- Based on the success of the POC, we helped them prioritize and identify seven processes for automation in one of their department.
- We then helped the client create the business case for automation in 17 processes cutting across different departments, which had the potential to make a positive impact on the ROI.
- Afterward, we did a consulting engagement to help them set up a COE for automation at the group level, defining the accountability with business, IT, and operations to smoothly run the automation program across the organization.
- With the help of COE, we helped the client in setting up a Factory Model to efficiently and effectively serve six business units.
- And in the last step, we also integrated computer vision technologies, business analytics, AI, process mining, and other technologies to im plement hyper-automation for increasing the maturity of automation capabilities in the organization.

Impact and key highlights

The implementation and scaling of automation increased process throughput and reduced costs across the business units for the client. It also enabled them to seamlessly conduct business during the COVID pandemic as they had adopted and scaled the automation early on.

The organization-wide deployment of automation also helped our client achieve the below benefits:

- 40K hours automated annually

- 100 percent transactions being processed the same day

- 40 percent overall average handle time (AHT) reduction

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