Business Process Management
for Large Insurance Company

Challenge

Our client was a large commercial and personal insurance company with $30M in annual revenue. The client needed a management solution that is flexible and scalable. From commission accounting to customer account creation management -- their back-end needed an overhaul that would provide a robust and scalable solution to meet their growing needs.

Solution

Working directly with the client's teams, we conducted discovery and brainstorm sessions to understand their business needs and identify opportunities by analyzing highly impacted areas within their business structure. During the sessions, we prioritized the operations that can be easily enhanced to offer instantaneous returns. Once the road-map is chosen and developed we provided an adoption session. The adoption phase allowed intensive training where our teams work very closely with our clients to perform continuous trials and testing and ensured a seamless transition from their hands to ours. Once our solution was fully implemented, VDart BPM our client-side support allowed the client to scale up the revenue growth to maintain trajectory.

Results

- Customer account creation and policy updates on a cloud-based, agency management software platform
- COI's and certificate creation at the request of the customer while also solving their service queries
- Assign policies to different agents to ensure each and every policy is taken care of
- Complete customer applications from a cloud-based software
- Calculate agent commissions on the basis of the scale and financial esteem of their managed accounts
- Manage renewal calculations of existing policies and also update charge-back calculations using their current software

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