

Leading Professional Services Company restructures its operating model across Canada

In today's intense, competitive and highly complex business environment, the need to be market-focused and employee-centric is more critical than ever.

Our client is a global professional services firm providing a broad range of health, risk, and retirement solutions. With offices spread worldwide, they help customers design and implement secure and sustainable retirement plans using proprietary data and analytics to deliver insights that reduce instability and improves performance.

In a crowded market like insurance, customer experience is a crucial component for differentiation. For our client, delivering excellent customer experience means not just the execution of an insurance product, but also the satisfaction their customers get for doing business with them.

A significant amount of the client's business in Canada comes from policy renewals. The front office formed by the Account Executives (AEs) and the Brokers, middle office consisting of Associates and Coordinators, and the back office mainly drive the business for the client.

With over 20 branches in Canada, the client's front, middle and back offices were performing work differently across clients causing discrepancies. For instance, though the client was using the same homegrown system for invoicing in Toronto and Calgary, the process of getting someone to generate an invoice

was different. While the job was getting done, the teams interchanged their work based on individual customer needs.

Some branches created centralized teams doing the work of both the middle and back office roles. As a part of their ongoing efforts to drive an actionable growth strategy, they had five main business objectives.



Time for a Change

First, our client wanted to standardize up to 30 processes and implement the changes across their branches. They were looking for a platform of the future that would deliver modern and user-friendly colleague requester experience. They wanted a way to segment work between the front and back offices by providing them with the ability to create requests.

Additionally, they needed the ability to gather accurate data on types of requests, quantity, and efforts required to resolve a query. Their objective was to move from distributed processes to common standard processes by leveraging a portal to streamline their work. To improve

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the quality of their operations while letting the front office focus on client-facing activities and managing relationships, the client wanted to build a suitable middle office.

The client began their transformation journey by identifying their main processes (Invoicing, Certificate Management, General Support for Sales and Broking) across all locations in Canada.

Harnessing ServiceNow

INRY conducted workshops to assess the client's maturity level and establish a transformation-driven architecture. During our interaction with the client teams, we discovered that the AEs work closely with their customers and empower results for them by delivering innovative solutions.

As they serve customers throughout the year, they do not have time for transactional activities; therefore, the middle office helps them with administrative tasks. The back office works on the cases created by the front and middle office and provides suitable solutions.

We created journey maps to understand the processes across all touchpoints and converted them into ServiceNow ®. We simplified the processes for the client's internal customers by implementing ServiceNow CSM.

Our delivery team focused on creating EASE (Efficient, Agile, Secure Experiences) for our client. With vast CSM experience, our team matched the client's need for speed. INRY rapidly created wireframes for a case management portal. Upon finalization, we built a

mobile-friendly portal.

Single Entry Point

The case management portal gives the AEs a one-stop-shop to submit and manage their service requests. It allows them to request various services including special client services, adding or canceling new policies, making policy changes, requesting policy renewal, and much more.

Previously, the client used spreadsheets and emails to create requests. It was scattered across multiple places and was difficult for the AEs to follow up with the back office.

Now, these requests can now be initiated through the service portal. The portal also provides the AEs with the ability to track the status of the requests; helping them keep their customers informed about the status of their policy at all times.

Streamlined Process

Prior to the ServiceNow implementation, the client used a third-party tool to manage their customer data, such as account details, contacts, and policy information. While creating requests, the AEs were Required to fill in these details to provide customer authentication.

They had to shift between several platforms to access customer information. INRY's integrations of the tool with ServiceNow now allow the AEs to view the customer data

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in one single place. This reduces the time spent shuffling between different platforms and allows them to focus on customer queries.

Strong Foundation

Intuitive dashboards enable the client to create and distribute reports that provide the status of all the requests created, number of open requests, and their priority.

ServiceNow combines the power of the platform with the single data model to generate information as and when the leadership needs.

Management can get predefined and customized reports and can create eye-catching dashboards in a flash. Empowered with this data, they will be able to make business-related decisions. Further, the performance metrics provide the client with the visibility and insights they need to act and drive service improvement.

From identifying processes to automating them, multiple vendors have come together to help the client define an operating model and achieve operational excellence.

With the initial implementation, INRY has set the stage for the client's enterprise transformation.

Highly encouraged by the outcomes in Canada, the client now is looking to standardize their processes across all their offices. They aim to standardize their processes and gain efficiency in all their locations through enablement and steady adoption.

"This project has brought out the best in our colleagues, everyone collaborating for effective change," says the CEO.

INRY continues to guide the client in streamlining their processes and improving the colleague and customer experience further.



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