

Insite helped enable optimizations and critical resources to save this client \$1M+ in only 6 months.

As one of North America's largest reinsuring organizations, our client provides specialty casualty and property insurance solutions that insuring companies require to remain competitive.



11 FTEs

Labor Reduction Through
Process Automation

\$1M+

Cost Savings
in 6 Months



Challenges

Our client first came to us for assistance with an end-to-end operational transformation. This mission to revolutionize their operations was born from the realization that their upcoming growth plan would require a stronger operational foundation to achieve targets.

Our initial evaluation included a **comprehensive data analysis and process mapping** across all business activities and platforms. Using our **MegaMap® assessment**, we uncovered a pattern of effort duplication and inefficiencies. **We identified 78 opportunities to optimize processes**, create enormous cost savings, and propel our client to their next phase of growth.

We uncovered challenges that touched all operational activities, including:

- **Lack of tech-enablement** that consistently required manual resolution
- **Excessive time and effort waste** due to inconsistent onboarding activity management
- **Processes had limited documentation**, leaving relationships as the sole facilitator of information flow
- **Limited artifacts and defined processes** that led to lapsed and complicated communications
- **Lack of transparency between teams and understanding of ownership** left task incomplete or under par
- **Utilization of overly skilled resources to manage workflow** created substantial waste of critical resources



Solution 1:

Our experts developed a strategy for new technology that would streamline and automate the end-to-end process for vetting and onboarding new customers. The result was a **custom Power App Automated Digital Working Tool** that enabled the client to move through critical functions at a rapidly increased rate, including vetting and onboarding new customers, and identifying engagements that would not drive revenue.

Powered by power apps, this custom tool is a collaborative digital portal that houses the entire end-to-end onboarding process for new customers. It allows all brokers and underwriters to play their respective roles and **manage all onboarding processes within a singular digital workspace.**

Now, every potential new customer acquisition process follows one streamlined workflow, historical data is saved, all fields are tended to, and should an unsuitable customer return for consideration at a later time, the entire vetting process can be bypassed based on prior onboarding activities. By optimizing these processes, **we identified 11 FTEs that the client no longer needed** to successfully enable their upcoming growth plan.

Solution 2:

With an enormous workload now automated, we shifted focus to the **development of a new and critical leadership position for our client's unique operations: the Engagement Manager.** The purpose of the role is to have a single individual that is responsible for the realization of tactical and strategic outcome activities, projects, and initiatives across all critical business functions. This individual would be the right-hand and force-multiplier to the leaders accountable for the customer ecosystem.

We provided a **custom onboarding strategy and support plan to guide the Engagement Manager through their first critical months.** This comprehensive guide outlines strategies and tactics to identify and engage stakeholders for relationship building and training, understand the business requirements, set goals, and quickly gain traction so the incumbent could set up a foundation for long-term success in the organization. We included a custom-built **"100-Day Success Plan"** to provide a **role-specific day-by-day onboarding structure** that ensured the Engagement Manager was prepared to hit the ground running.



Results

By optimizing the onboarding process, we were able to **reduce labor by 11 FTEs** that the client had previously forecasted as a critical need to achieve their growth targets. Even without the recruitment of these additional FTEs, our client was still on track for performance and growth improvements.

Together, eliminating the 11 now obsolete FTEs and developing the Engagement Manager role to accelerate business success, **saved our client over \$1M within the first 6 months of implementation.**