BPM-D® CASE STUDY
RPA HEALTH CHECK TO SUPERCHARGE
RPA PROGRAM FOR MAJOR INSURANCE COMPANY

Summary
Enabling real insights through RPA assessment to get automation program back on track and fully realized the overall value of RPA investment.

Organisation Background
A major health-payer company launched its RPA program and executed the initial project in the claims area. The IT department was able to successfully get 12 bots up and running on-time and on budget. There were growing challenges regarding the real business impact of the RPA investment, as there were no cost, people or cycle time reductions being realized by the business. In addition to the disconnect between business and IT, after 12 months of operating the program, there were no more demand for the RPA team within the company.

Business Challenge and Opportunity
The company began to experience growing frustrations regarding the overall value of RPA. The leadership of the business units did not see any real value and quantifiable benefits of the technology. RPA started to get a negative image and there was a growing disconnect between business and IT. Even though all the automation was functional, the business ascertained that the project was unsuccessful as it did not deliver the expected business results. This also caused other business units to lose interest in the automation program. For the various initiatives, new digital process tools were leveraged to connect stakeholders and project teams across different business units in different locations and countries.

The BPM-D team and a technology partner were brought in to perform an RPA Health Check so that potential improvement areas can be identified and provide a roadmap for successful RPA initiatives and alignment of business and IT.

BPM-D Enablement
An RPA maturity assessment in the 5 dimensions (people, process, technology, strategy and governance) was applied. The assessment revealed that the automation program made good progress from a technology point of view. The challenges are in releasing value to the business, which stemmed from the way processes are targeted and how the RPA lifecycle was governed. Improving the automation program required:

- **Value-driven BPM Process Repository** Cross organizational view to understand the E2E process context, enabling quick identification of the RPA impacts to the business both upstream and downstream.

- **Targeting Automation through BPM Lens** Better prioritization to target high impact, low maturity processes for RPA intervention and overall process improvements.

- **Effective Governance Structure** Defined roles for Business and IT as part of a governance organization to provide strategic alignment and accountability throughout the RPA lifecycle.
Workforce Management: Effectively combine RPA robots and human workforce to release full value.

Alignment of Business and IT to realize full value of RPA technology and initiatives through an integrated transformation organization and governance.

Reorganization of transformation and automation capabilities to focus on business outcomes and identify value-driven automation opportunities.

Enhanced prioritization and value targeting to improve project selection.

Comprehensive view and increased transparency of business processes through process model-based approach and process repository.

Set realistic expectations for benefits, aligned with the agile RPA development approach.

Increased accountability and value delivery approach across the RPA lifecycle.

Results

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