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CASE STUDY – INSURANCE

# Enhancing Call Flow Efficiency at a Leading Global Insurer

## OVERVIEW

A Fortune 500 global risk management company, with a market capitalization of $5.8 billion and over 13,600 employees serves millions of customers across housing, lifestyle, and automotive sectors. The company sought process mining and self-service solutions to optimize its call flow and address operational inefficiencies.

## Challenges

- **Call Flow Visibility:** Although the insurance provider had documented its call flow using tools like Visio, there was a gap between the documented process and the actual behaviors within the interactive voice response (IVR) system.
- **Different Caller Types:** The call volume was split between two major caller types: contract holders (customers) and repair facilities, with the latter forming the majority of calls.
- **Lack of Granular Data:** Without proper visibility into what was happening during the calls, making high-accuracy projections and informed decisions was challenging.

## Objectives

- Gain a clearer understanding of the actual call flow behaviors using process mining.
- Identify opportunities to improve efficiency, particularly through self-service options.
- Generate high-level projections for potential savings if improvements are made.

## Solution

- **Process Mining with Apromore:** The company used Apromore to analyze its call flows. The goal was to gain insight into the real call behaviors as opposed to what was assumed from documentation. The team spearheaded this exploration, aiming to use Apromore to "crawl" through the call flow and generate insights.
- **Self-Service Exploration:** The team was considering implementing self-service features to reduce the volume of calls routed to live agents. These features could include chatbots, automated responses, or links to self-service websites. The company was already using similar approaches in other areas, such as directing customers to file claims through online portals. The use of Apromore's simulation helped the company understand where best to use self-service features and quantify the expected impact on process KPIs such as first-touch resolution and on-time performance.
- **Projection of Savings:** Although  conducted back-of-the-envelope projections to estimate potential savings, they acknowledged the limitations of the data available at the time. For example, if 100 calls are handled and 80 are routed to live agents, introducing self-service could potentially address a portion of these calls. However, the projections were rough due to the lack of complete data.

# Results

While the project was still in its exploratory phase during the discussion, several key points emerged:

### Lack of Process Transparency

leveraged process mining to gain visibility into the actual flow of calls through its IVR system, which previously had limited clarity.

### Opportunity for Cost Reduction

The introduction of self-service options was identified as a key strategy to reduce operational costs by diverting simple inquiries from live agents to automated channels.

### Need for Precise Savings Data

Early projections suggested significant savings potential, but more granular data would be required to accurately measure the full impact.

## Conclusion

By leveraging Apromore and implementing self-service solutions, the company is on a path to enhance the efficiency of its IVR system. This project aims to reduce call center workloads, improve customer experience, and deliver cost savings. The success of the initiative could inspire other departments to adopt similar strategies as the company continues exploring process improvements and automation.


### About Apromore

The Apromore™ platform is an easy-to-use, fast-to-deploy AI-driven process mining solution that enables business and technology teams to quickly visualize and analyze their business processes, and simulate proposed changes prior to implementation in order to measure impact and risk.

The result of over a decade of extensive research and innovation from leading universities, the Apromore platform includes no-code features and a simple UI that continuously delivers new insights into operational performance and compliance.
For more information, visit https://apromore.com/product