

# Automated Solutions for Manual Processing

When an insurance coverage broker group was hurting...  
automation identified and healed their “pain” points.



## CASE STUDY SNAPSHOT

### The Challenge

- Resolve a backlog processing issue
- Improve the processing of insurance enrollment forms

### The Solution

- Xerox® Automated Intelligence Technology with optical character recognition
- Online Document Management (ODM) solution

### The Results

- Significant cost savings
- Nearly 50% reduction in mailroom staffing
- Minimized reliance on paper reports



**THE CHALLENGE**

When an insurance coverage broker group was looking for a partner to assist them with resolving a backlog processing issue for their Catastrophic Major Medical Claims they came to Automation Innovation. Some while later, they again reached out for a solution to improve the processing of insurance enrollment forms.

The group was not meeting their service level agreements due to their claims processing issues.

**THE SOLUTION**

When looking for a solution for the processing of insurance enrollment forms, the insurance coverage broker group was referred to Xerox by an insurance carrier. The Automation Innovation team proposed using optical character recognition technology through automated intelligence from Xerox. The technology was implemented successfully.

When the optical character recognition technology was implemented, the effort turned to their current rebadge agreement, where Xerox rebadged 35 staff members to take over the mailroom processing. About that same time they were developing an Online Document Management (ODM) solution for their Premium Accounting team which eliminated the use of paper and moved everything to electronic processing. The ODM solution removed the dependency on paper and moved the entire process to an electronic format.

**THE RESULTS**

The insurance coverage broker group reported significant results around headcount reduction and cost savings after the solution was implemented. The chain of events surrounding the rebadge led to the reduction in headcount which was a major win on behalf of the group. Before the rebadge, the headcount for the mailroom was at 35 and after the rebadge it was reduced to 18 people. Prior to the ODM solution being in place, the Premium Accounting team was completely dependent on paper reports. Now everything is electronic and running smoothly.

**THE BOTTOM LINE**

They experienced significant benefits using current technology by reducing their headcount, increasing their cost savings and processing more of their manual processes electronically. The insurance coverage broker group is currently working on a Request for Proposal (RFP) to add additional processing which would more than double their annual revenue.

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