

ROBOTIC PROCESS AUTOMATION IMPLEMENTATION FOR MEMBER DATA UPLOADS

SOLUTION

- Automation of member data uploads by developing and implementing an RPA solution that ensured seamless uploading onto the in-house administration platform

BUSINESS AREA

- Group Risk Administration

SKILL SETS

- Data Analysis
- Business & Process Analysis
- Safe Agile Methodology
- SQL

THEMES

- Group Risk Benefits
- Data and Technology
- Robotic Process Automation
- Downstream Process Integration
- User/System Testing

INSIGHTS

- Consider a combination of top-down and bottom-up approaches when scoping the process
- When relying on different source data applications, it is vital to consider the data quality upfront, before any development commences
- Have a clear understanding of the data provided and format thereof from the different data providers
- Involve downstream users early, especially if there is a change in data structure

TESTIMONIAL

“Monocle’s business knowledge of the process and technical capabilities were a huge contributor to the success of this RPA solution.”

Head of Member and Premium Administration

OVERVIEW

A leading insurance firm embarked on a digital journey in their Group Risk business unit to achieve compliance with the Policyholder Protection Rules (PPR) legislation, as well as to achieve continued digitisation. A significant challenge that many insurers face, especially those that are involved in the group risk space, is to achieve monthly updates of member data on their respective administration systems.

To assist in removing this constraint, Monocle was tasked by the client with optimising and automating the member data upload process. Monocle assisted by implementing a robotic process automation solution that would allow for the automated upload of member data from source. Monocle was involved from concept to delivery/embedment, working with the client on the overall solution, building and documenting the required business and technical specifications for implementation, process mapping, testing and post-production support to ensure effective handover and solution embedment.

Monocle was also tasked with identifying and unpacking the data quality and structure received from the distinct data providers. This entailed analysing and identifying data quality and format issues, documenting gaps and differences in the manner that data is received, and implementing solutions to ensure the data used by the automated process is structurally aligned and accurate.

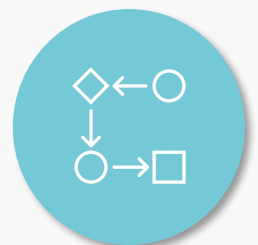
RESULTS



Automated the member upload process for schemes in the Group Risk business unit



Able to process and upload huge data volumes that would not have been possible without RPA



By automating repetitive tasks, administrators can divert their focus to the exception scenarios

KEY SKILLS REQUIRED

- An understanding of the Group Risk processes, the subject matter and concepts involved, and the data required to enable these processes
- Technical knowledge as data – which is received in different file formats – must be uploaded automatically to the in-house administration platform by means of a robot
- Experienced business and process analysis knowledge in order to scope processes efficiently, make recommendations and implement value added solutions
- Business and technical knowledge of RPA, as well as the Safe Agile Methodology