



# GLOBAL INSURANCE PROVIDER: AUTOMATION OF SALES REPORTING AND WEEKLY PROJECTION

SECTOR: Insurance  
REGION: Global

## Key Challenges



Exhaustive and time-consuming manual rework



The report takes 4-5 hours to generate

## Benefits Derived



80% reduction in processing time



100% accuracy



Reduced AHT from 4 hrs to 20 mins



Removed manual rework

Our client, a Global Insurance provider, wanted to automate their Intermediaries product dashboard, which is a weekly process that generates a sales report of performance and sales projections for 11 global insurance products.

This involves data analysis based on all previous data to provide a summary as well as projections based on 12-week data.

The report is generated for being included as part of the summary dashboard (the Executive management presentation deck) as well as product wise information. The management team utilizes the report to compare product forecast and devise sales strategy accordingly for all their Global offices.

The report provides information on the current sales performance of each product. Based on this, the sales projections are calculated. The report summarizes the current performance and projections for next week – compared to the previous weeks. Specific graphs & charts are also presented in this report.

This report takes 4-5 hours to generate.

### Our Analysis:

In partnership with client, TAO was responsible for the delivery of the following activities. This project paved the way for other RPA projects to be initiated within the organization:

#### TAO team delivered the following:

- Initial Assessment phase – Identify complex excel based process with data heavy spreadsheet for automation.
- Scope of automation – Automate the process of extracting product information from multiple product sales information spreadsheets stored in a shared drive, consolidate information, create pivot and graphs, compare product performance with the previous week, month, quarter, and create projections.
- Blue print document with Solution approach, AS-IS and TO-BE process

workflows; Process Description Documents and Solution Design Document.

- Configured automation solution, including interactions/interfaces between various components.
- Added validation checks to ensure independence, accuracy and completeness.
- Training was provided to the IT Support team to support production issues.
- TAO team created .NET custom code to re-create graphs in an EXCEL. This was because, as and when the figures changed after the 1st run or generation, the specific automation product being used did not cater to continued modifications to the graphs. It kept depicting the earlier graphs. Thus, the TAO team had to ensure this feature worked properly as it was key to management decision.

**The key challenges for this client were:**

- Each time the Management wishes to change a figure, the spreadsheet system had to re-run macros to generate the figures.

**Business Benefits Delivered:**

- Reduced AHT from 4 hrs to 20 mins. Operations team had an exact SLA of 4 hours to create report before weekly management call
- Input data is available on Friday morning and report must be delivered same day by 4 pm India time
- Operations team had to rework the entire report in case of errors as it was difficult to check source of error
- Removed manual rework which was exhaustive and time consuming

The client is now in a position to roll-out the automation of the process on the basis of the assessment and its demonstrated business case.

For more information on this assessment case please write to us at [talk2us@taoautomation.com](mailto:talk2us@taoautomation.com)