

Use Cases for Insurance: Pensions Customer Journey

Improve service for pension customers by enabling the frontline and streamlining the back office operations.

CUSTOMER PROFILE

- Multinational, multi-line insurer
- 30 million plus customers
- 25,000 plus employees

CHALLENGES

Inefficient processes and limited visibility of customer information, negatively impacting both customer experience and business results.

- Shift in demographics and pension reform increasing pressures on the business.
- Siloed data creating multiple fragmented views of the customer.
- Manually intensive back office processes.
- Data and systems walled-off between departments; contact center using different systems than operations teams.
- Each customer demand request requiring access to multiple systems to fulfill.
- Growing volume of work with no self-service capabilities.

SOLUTION GOALS

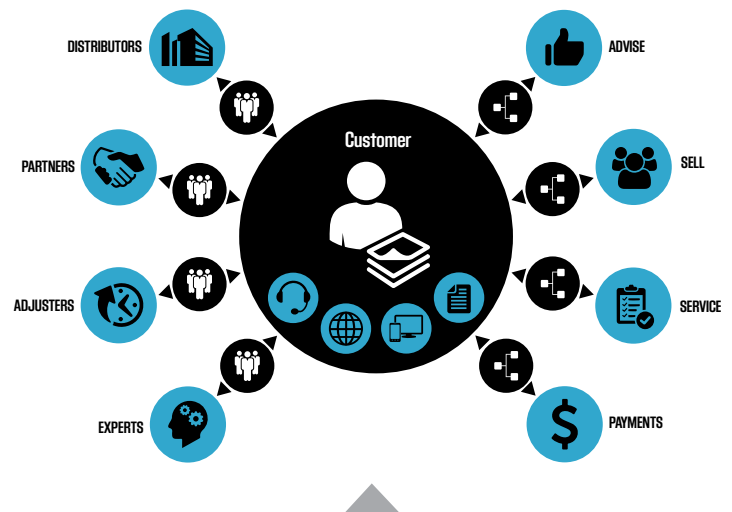
Undertake a multi-year enterprise-wide transformation program focused on efficiency and effectiveness. Respond to market and margin pressures with improved customer-centric information and streamlined processes for a holistic view of the customer lifecycle.

- Automate manual processes and reduce paper burdens.
- Create a composite view of the customer and eliminate the need to maintain separate systems across call center and operations.
- Address the growing volume of work and deliver self-service as employees pay more attention than ever to their own retirement plans.
- Reduce number of customer calls per demand request and improve accuracy of information provided.

RESULTS

With the Appian Digital Transformation Platform, and the Appian Records capability, the insurer achieved:

- Single view of the customer with a unified hub to fulfill customer demands.
- 40+% Reduction in customer service operational costs within 6 months.
- 9X Acceleration in customer service response times.
- 20+ Systems consolidated to 4 synergistic applications.



With powerful capabilities to connect the enterprise, Appian enables transformation of complex, disconnected processes, data, and systems.



Use Cases for Insurance: Pensions Customer Journey

PRIORITIZE

Capture new markets and new business when you prioritize efforts to better serve customers.

- Increase engagement with an intuitive user interface
- Improve customer service to increase customer loyalty
- Unify process, data, systems, and people for better decisions
- Achieve rapid development of customer-centric applications

FOCUS

Transform your business processes to become a connected company in the digital world.

- Eliminate back-office inefficiencies with rapid digital innovation
- Converge all relevant data to a single location in order to improve decision-making
- Operate on-premises or with cloud-based applications

PREPARE

Achieve the efficiency and agility needed for the future while leveraging existing IT investments.

- Modernize IT infrastructure without a rip-and-replace initiative
- Break down siloed data structures
- Advance enterprise mobility efforts
- Expand implemented solutions to solve future demands

ORGANIZATIONS ACROSS INDUSTRIES TRUST APPIAN



Appian

Appian delivers an enterprise platform for digital transformation that enables insurers to become connected enterprises in the digital world. Powered by industry leading Business Process Management (BPM) and Case Management capabilities, Appian's low-code approach can radically accelerate the time it takes to build and deploy

powerful, modern applications, on-premises or in the cloud. The world's most innovative organizations use Appian to revolutionize their customer experiences, transform their business operations, and master global risk and compliance.

For more information, visit www.appian.com