

Case study – Institutional Benefits Administration Company



BPM Strategy & Enablement

Process documentation, standardization and optimization

Business Objective & Challenge

The Major Accounts Outsourcing (MAO) group with the Benefits Administration Company needed to standardize and optimize its' service processes in preparation for a product re-launch and the resulting projected increase of client implementations.

The existing capabilities of the Benefits Administration Services (BAS) operational environment could not support the growth as the processes and documentation were inconsistent, not aligned with standard MAO practices, and did not utilize standard applications.

Collaborative Solution

In preparation for a product re-launch the Benefits Administration Company engaged Collaborative Consulting to define and document a future state process playbook inclusive of procedure improvements, recommendations for implementation, and adoption of standard best practices.

A team of Collaborative business process management experts:

- Analyzed and cataloged existing MAO Service policies and procedures, tools and systems to determine where best practices existed and to identify process improvements.
- Documented a detailed operational process Playbook which contained organizational definition, process maps, roles and responsibilities, key system interfaces and known process issues.
- Redesigned BAS Service processes to incorporate best practices processes, systems and tools, and Company specific process requirements.
- Provided recommendations for implementing and managing process and procedural documentation.
- Delivered a risk assessment focused on the anticipated organization change management needs expected as a result of the process improvements and standardization required for the product re-launch.

Results

At the conclusion of the engagement, the Benefits Administration Company had cross-organizational actionable roadmap to optimize and standardize process and procedures. The new processes and tools enabled the operations teams to implement and service their client's with fewer errors and greater efficiency.