CGI

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Streamlined Enrollment Workflow

Redefined processes and support roles improve customer experience and achieve 50% savings in print production costs.

Business challenge

A global healthcare and voluntary benefit insurance company had disjointed processes, outdated tools and undefined ownership for its end-to-end enrollment process. The workflow was fragmented, with various bottlenecks frequently requiring "fire drills." Widespread inefficiencies gave rise to multiple "quarterback" roles, from pre-sales thru enrollment to servicing. In addition, a significant percentage of their external-facing collateral materials were being produced by field personnel, resulting in compliance risk and added overhead. There were disparate systems and few metrics to support decision-making and process management.

Client objective

The client aimed to greatly expand their operating capacity by making process and system enhancements that would:

- Establish strong accountability within the organization for the enrollment and collateral fulfillment processes supported by functional expertise, structured training and client facing "soft skills"

- Implement a well-defined enrollment workflow that is actively managed, consistently executed, and is both predictable and measurable

- Put in place a solution that will provide an "end to end" view of critical case information, process insights, and additional opportunities for improvement

CGI's approach

CGI used proprietary frameworks and diagnostic techniques to define:

- A consolidated change implementation plan to include:
  - Enhanced management structure that ensures authority and accountability
  - Formal program structure combining governance with required expertise
  - Staged approach to ensure expectations and impacts are clearly communicated
- Functional roles to better align with market and organizational needs
- A new operating paradigm to enable home office staff to meet cycle time expectations
- A centralized fulfillment solution for creating, assembling and delivering collateral

Value delivered

Through the CGI effort, the client is better positioned to efficiently and effectively manage end-of-year enrollment volumes.

The client also anticipates over 50% savings from printing and mailings, along with the added ability to manage overall spend going forward.

Furthermore, the refined functional roles are recognized as critically important to positively impact client and customer experiences.

Founded in 1976, CGI is one of the world's largest IT and business consulting services firms, helping clients achieve their goals, including becoming customer-centric digital organizations. Project profile originally from Paragon, which merged with CGI in December 2017.

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