

WESLEYAN ROM 2 Foundations Enables Wesleyan to Process Customer Requests 90% Faster

Business Impact

64%

faster processing of investment products

90%

faster response to customer requests

6,300

hours given back to the business from the bereavement process

Wesleyan has been helping its members reach their financial goals since 1841 and has a unique business model — it's a society rather than a corporation. They focus on delivering benefits to their members, and members share in the Society's profits. Wesleyan recently partnered with SS&C Blue Prism Professional Services to do an SS&C | Blue Prism® Robotic Operating Model™ 2 (ROM™ 2) assessment to help them set the right foundations for their intelligent automation program and to better utilize the technology to service their customers.

“SS&C Blue Prism was instrumental in opening the business’s eyes. The ROM 2 assessment demonstrated the solution’s scalability but showed us also what we were missing and what needed to be improved upon to make it scalable. That initial assessment was pivotal in driving the senior stakeholders and the leadership to make the necessary changes.”

Paul Williams
Head of RPA
Wesleyan

Challenge

Wesleyan had implemented an intelligent automation (IA) program four years ago. However, the technology was underutilized and hadn't scaled much beyond the initial processes. The organization aimed to increase operational efficiency, reduce costs and increase customer efficiencies by using the technology already active in the business. Quickly delivering services to Wesleyan customers was top-of-mind for their C-level executives. To do this, they needed to maximize IA's potential and ensure their IA program was robust and scalable.

Solution

To best evaluate their automation program, Wesleyan teamed up with SS&C Blue Prism Professional Services (PS) to conduct a ROM 2 assessment. The PS team looked closely at Wesleyan's IA program and evaluated its maturity and alignment with industry standards and best practices. The team identified gaps, helped put standard documentation in place and recommended specific roles and responsibilities for Wesleyan's small automation team to ensure they maximized their efforts. Each department in the organization was assessed, which gave the automation team a good idea of where to start with each group.

The ROM 2 assessment demonstrated to senior executives that IA could quickly and easily scale to meet their needs — and illuminated what

needed improvement to make this possible. Before automating a process, the team made changes to ensure each process was more effective for the business and the user.

The automation team continues to work with Professional Services to ensure they're adhering to the ROM 2 and values the relationship with SS&C Blue Prism. SS&C Blue Prism's methodology and low-code aspect encouraged Wesleyan to build an object library so that they can now reuse parts of automations and rapidly roll out new automations.

SS&C Blue Prism digital workers have been valuable partners for Wesleyan's bereavement claims processing team. When a policyholder dies, their loved ones contact Wesleyan to settle affairs. Prior to using IA, there was a manual notification process which could cause delays at a very sensitive time for a claimant. Employees now ask claimants a few simple questions, fill out a form and empathetically speak with the individual. Digital workers take the information from the form, make decisions based on the claimants' products and in some cases process and pay the claim.

Wesleyan continues to grow their program and plans to incorporate technologies like artificial intelligence (AI), machine learning (ML) and optical character recognition (OCR) with their digital workforce.