Insurance Software company improves business efficiency

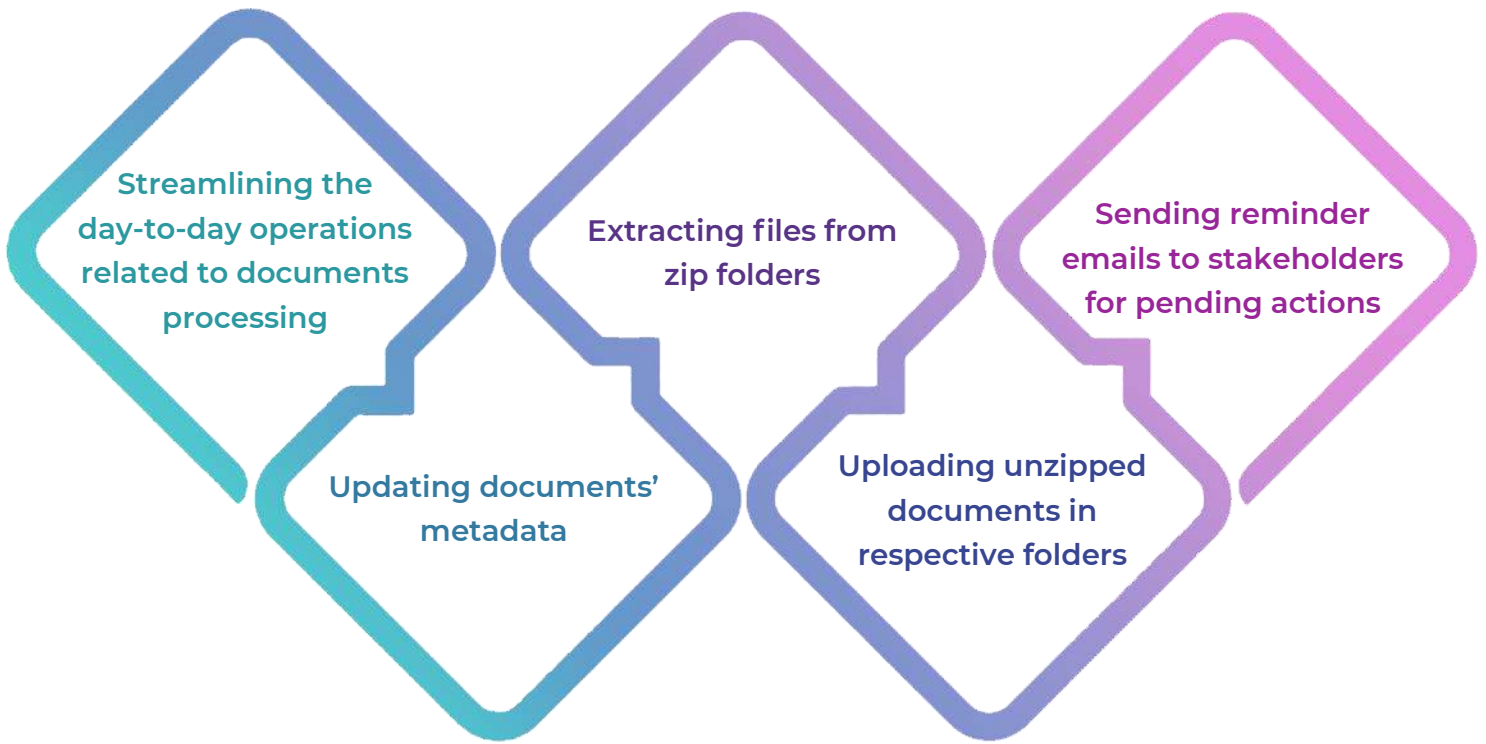## Client Business Description

The client provides a natural language processing framework that automatically extracts and organizes data in insurance documents. Their solutions enable their clients in the commercial insurance industry to make more timely business decisions.

Objective

Streamlining the day-to-day operations related to documents processing.

Challenges

➤ Documents remained the centre of knowledge management and decision-making for our client's data-driven teams.

➤ While documents were an ideal channel for communicating information, the process to track progress on these documents turned overwhelming for their teams.

➤ It was critical to share, interpret, and act upon several documents that were received on a daily basis from clients, vendors, and more.

➤ The document types included contracts, manuals, invoices, requests, quotes, briefs, reports, etc.

➤ Reducing the number of hours spent on manual work was needed immediately.

➤ There was a need to analyze and optimize the performance of some highly used features of their platform

Streamlining the day-to-day operations related to documents processing

Extracting files from zip folders

Sending reminder emails to stakeholders for pending actions

Updating documents' metadata

Uploading unzipped documents in respective folders

Maintaining data and documents was a nightmare while performing manual or digitized processes. Also, having to move documents and data manually was time-consuming and heightened chances of errors.
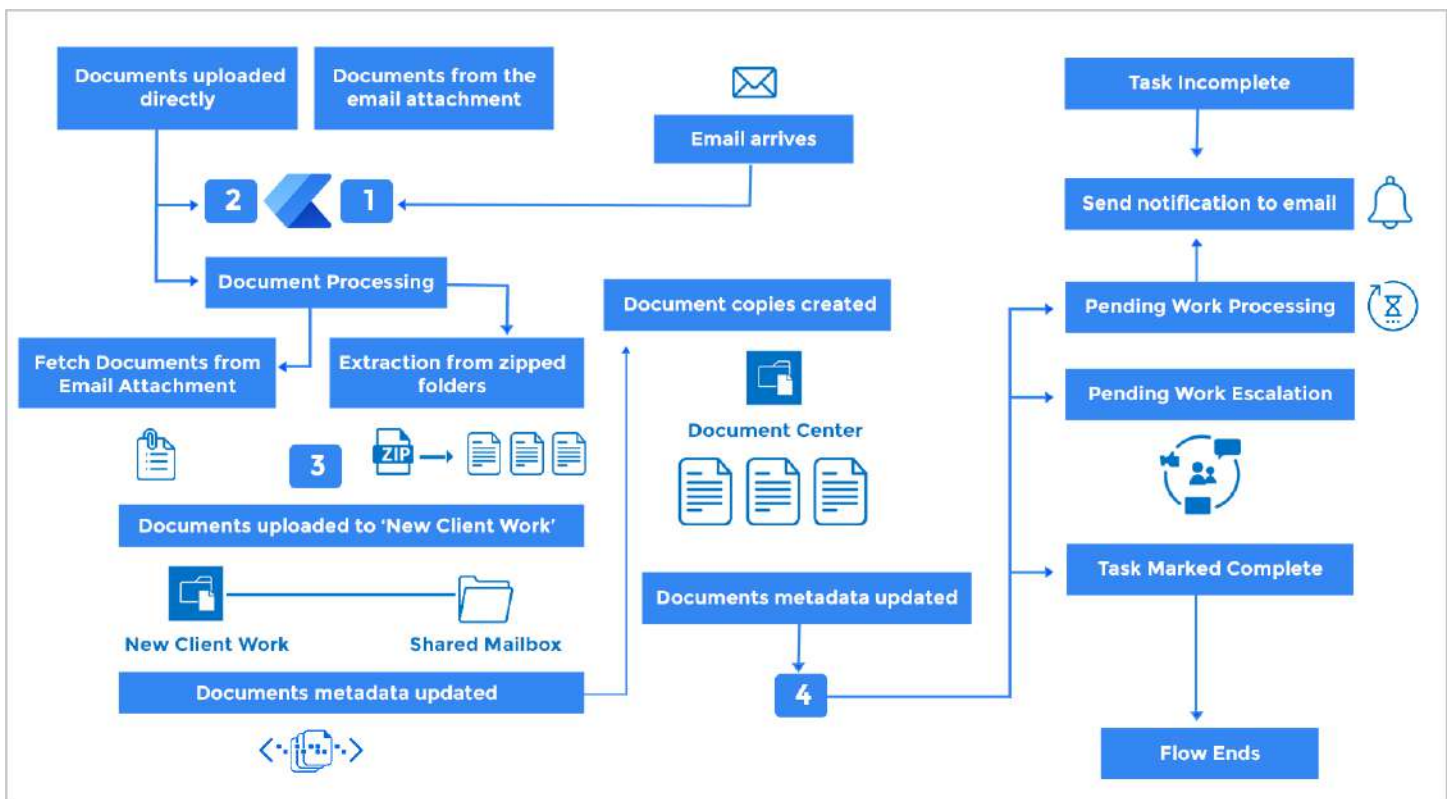
Our Solution

Beyond Intranet streamlined the way the client tracked and prioritized the processes associated with each of the documents received. Our expert Microsoft 365 consultants created two dedicated SharePoint libraries - Client New Work and Document Center.

Leveraging Power Automate

We implemented Power Automate flows across the processes within these document libraries to automatically push the documents received at Shared Mail Boxes and Client New Work to the Document Centre. The flows also enabled tracking various phases of the documents within the Document Centre, updating their metadata, and sending notifications to the user. Beyond Intranet's Power Automate consulting and implementation fit the bill, without permitting any process to fall through the cracks. With the new solution, the client enabled their staff to automate their document workflow processes with ease.

Performance Testing & Monitoring

Our QA team performed load testing using JMeter and analyzed the speed, response time, stability, and resource usage of a web application, and APIs. While performing non-functional and maintenance testing, our QA team also assessed how the system would perform under different load conditions. We built a concrete plan to streamline performance testing execution for the client's frequently used flows. We also provided scripts so they could run them as per their sprint releases to test all web pages' performance.

Technology Stack

Power Automate

SharePoint

SPFX
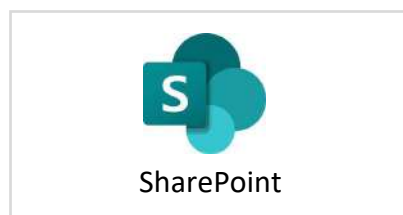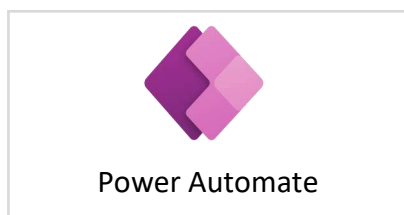
Results

Boosted efficiency

The client improved work processes and increased efficiency by freeing their employees from the manual work so they focus on more valuable, high-impact tasks. The solution helped the client propel their teams, departments, and organizations forward.

Eliminated busywork

The solution eliminated busy work that included pending tasks processing and escalation to stakeholders. The teams free up themselves by automating metadata updates and notifications to keep everyone in the loop without constant interruptions like email popping up and down.

Saved Time

Teams at LineSlip noticed the potential benefits of the solution with reduced time wasted on repetitive work eliminated human error. Now, they focus on more interesting, valuable assignments and work is something they are eager to tackle.

Streamlined Processes

The new solution provides intuitive and automated workflows that not only streamline data collection, approvals, and update requests but also replace manual, re-petitive tasks and unlock time for more valuable, creative work.