

## What if you could...

...take investment and maximize the financial your underperforming multi-million dollar IT and operational result?

**With Proudfoot, you can.**

**One of the largest insurance carrier and provider in the country** with 39 independent member companies operating in all 50 states, the District of Columbia and Puerto Rico contacted Proudfoot to assist them with a major technological problem.

Several years ago our client embarked in a conversion of several key platforms to streamline and with a vision to completely automate their clients on boarding process. This included the conversion to Salesforce and integration of two other leading edge CRM platforms. This was a multi year endeavor that was 33% overspent, incomplete and did not fulfill its financial benefit ROI.

Proudfoot was engaged to streamline the existing platform's workflows in order to eliminate user workarounds, multiple hand-offs, and other non-value activities as originally designed in the new CRM system. This people centric approach quickly achieved the efficiencies that were initially projected from the platform purchase and implementation.

"I am seeing the behavior of my people change before my very eyes."

**- Vice-President Sales Shared Services/Sponsor**



### A TRANSFORMATIONAL APPROACH

- 1 Engaged over 300** end users to analyze, critique and design their work processes to ensure voice of the customer, whilst also triggering the end-user change management process resulting in **accelerated process adoption** from the end-users.
- 2 Established a true partnership** between IT and the business functions where each understands their role in defining and developing the new business process requirements.
- 3** Prepare the organization for the **cross-functional training and skill development** needed for the new processes and management support systems.
- 4 Created an environment** where IT / technology outlays are seen as an investment and not an expense with each business function contributing to the P&L via **quantifiable financial benefits**.
- 5 Developed an IT road map** that is tied to improved business processes with direct linkages to benefits (time, costs, revenue, process quality).
- 6 A focus on improved customer acquisition and service** via more friendly processes and systems to increase revenues and profit.
- 7 Structured the organization** "to fit" the new streamlined processes eliminating redundant activities and positions.

### REMARKABLE RESULTS

**\$550K**

**Quick Sprint training & process** opportunities identified, and implemented

**20%**

Improvement in **labor capacity**

**10%**

Improvement in **labor costs, additional capacity redeployed**

Accelerated ROI realization by 2 years (from 5 years to 3)

**\$6.5M**

identified benefits

Accelerated financial benefits realization to 2 Years vs initial 5 Year forecast which offset the IT expenditure within implementation timeline

Engage employees at point of execution across all five service centers to ensure their involvement and participation in the future state, training requirements, deployment and implementation.

Fully integrate the IT teams and functional stakeholders into the Working and Steering Committees to increase understanding and alignment of outcomes, timelines and expected results.

# Proudfoot