Insurance

Group Health Insurance Client Onboarding

Implementation Partner: Mokxa Technologies | **Customer: Allied Benefit Systems**

ABOUT PARTNER

Mokxa Technologies is a global business solutions provider focused on delivering peace of mind to its clients by simplifying enterprise IT.

Powered by hybrid thinking and deep technology expertise, Mokxa specializes in providing CIO services, futuristic platforms, enterprise architecture, and enterprise risk assurance to industries like healthcare, BFSI, manufacturing, and more.

CUSTOMER AT A GLANCE

Allied Benefit Systems, is a national healthcare solutions company. Founded in 1980, they have grown to be the largest, independent third-party insurance administrator in the United States.

As part of their customer onboarding process, they introduce customers to their insurer's products and services, such as policy information sheets and welcome packages. The onboarding process also includes setting up downstream functions for their customers like payments, recurring enrollments, etc.

Industry:
Insurance

Firm Size:
501-1,000 employees

Country:
United States

50%
Productivity improvement

27%
Overall ROI

2000+
Groups onboarded within 6 weeks

CHALLENGES

- Onboarding processes consisted of several manual activities primarily managed through technologies such as spreadsheets and local databases
- Onboarding database and business documents were not integrated
- Recurring activities such as updating business rules, adding new products/services, and onboarding new customers necessitated the involvement of local technology-savvy personnel
- Security risks due to a lack of permission-based access
- Issues associated with manual processes such as limited tracking, human errors, and inefficiencies
- Difficulty in keeping track of Service Level Agreement (SLA) compliances and breaches, with inadequate oversight for managing SLA violations
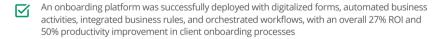
SOLUTION

Mokxa Technologies developed and delivered an end-to-end **Customer Onboarding Platform** within 3 months on Joget.

They have created a single system of record that seamlessly integrated with Allied Benefit's critical systems such as Enterprise Data Warehouse and Active Directory Integration, and built a UI-based Record Management System that allowed business users to initiate, track, update and close the onboarding process.

The solution automated over 10 business processes through 25 user screens. It empowers business users to take charge of their business activities by practically eliminating their dependency on technical expertise.

RESULTS

☑ An onboarding platform was successfully deployed with digitalized forms, automated business activities, integrated business rules, and orchestrated workflows, with an overall 27% ROI and 50% productivity improvement in client onboarding processes

☑ Enabled supporting functions such as the ability to create new products and services, add/modify business rules, view reports/dashboards, and user access management

☑ Creation and customization of new products and services were templatized to eliminate dependence on technical resources

☑ To effectively govern SLAs, controls and features were built in to highlight delays, monitor execution timeframe, manage escalation matrix, and trigger alerts. All business activities had built-in thorough and configurable auditability

☑ Overlays like executive dashboards and detailed data downloads ensured the right data types and views available to the right users

☑ Automated processes allowed staff focus on their tasks. Policies are baked into the design so no extra steps were required to ensure compliance, with Key Performance Metrics to ensure quality and performance

☑ Permission-controlled environment ensured access level security. UI-based user access management enabled administrative users to manage permissions. End-to-end tracking of business activities and relevant data resulted in effective and accurate reporting