Insurance

Mo-N-Flow

Implementation Partner: B Circle | Customer: One of The Leading Insurance Providers in Thailand

ABOUT PARTNER

Founded in 2015 by experienced consultants and developers specializing in software for document management and workflows, B Circle enables organizations to transition to a digital workplace and empowers employees to focus on creative, value-added work, while reducing resource consumption and fostering sustainable growth.

CUSTOMER AT A GLANCE

The customer provides a comprehensive array of non-life insurance services, encompassing protection against fire incidents, marine and cargo risks, automotive coverage, and various other insurance solutions.

With a history of more than seven decades, the customer has established itself as a pioneering force in delivering peace of mind and confidence to its customers. In the digital age, they continue to enhance its efficiency through technology, positioning itself as an effective and leading provider of non-life insurance services.

Industry:
Insurance

Firm Size:
Number of employees TBA

Country:
Thailand

2000+
Active users

80%
Reduced expenses

10x
Faster approval process

CHALLENGES

The internal process for requesting approvals via memos relied on the use of paper forms. In total, there were over 50 different types of paper forms.

Employees were required to complete these forms with the necessary information and submit them for approval in accordance with the company's management structure and authority. The company generated several thousand memos each month.

With branches located nationwide, the memo approval process involved passing through more than 10 stages, following the chain of command, before reaching the CEO for approval.

Completing this process took several weeks, and keeping track of its status posed a significant challenge. Additionally, there were issues related to memos getting lost during the process, resulting in high associated operational costs.

SOLUTION

Mo-N-Flow modernized the internal memo management system through comprehensive digitization. This transformation involves the conversion of all existing paper forms into electronic forms (E-Forms) and the establishment of an approval workflow that aligns with the organizational structure.

The approval authority is seamlessly integrated into Joget's Business Rules, providing system administrators with the flexibility to make necessary adjustments.

Once the memo process is completed, the system extracts data from the E-Form and approval history from Joget to generate a PDF memo. Electronic signatures from approvers are applied, and the PDF memo is merged with accompanying documents to create a single file.

This consolidated PDF memo is then stored in the Document Management system, ensuring easy reference and accessibility for users in need of the memo.

Furthermore, Mo-N-Flow has incorporated Line OA integration, enabling notifications to be sent to users via Line in addition to emails. The employee data and organizational structure are interconnected, guaranteeing that any changes in management personnel or department transfers are automatically reflected in the workflow process, eliminating the need for manual adjustments to the workflow.

RESULTS

☑ Mo-N-Flow accelerates the approval process, reducing the timeline from weeks to days

☑ Urgent requests can now secure approvals within 1 day from memo initiation

☑ This streamlining significantly reduces the administrative workload associated with memo tracking and management

☑ As a result, there is an impressive 80% reduction in memo-related expenses, and the approval process is now 10 times faster

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