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Global insurance company undergoes comprehensive HR digital transformation

Insurance, like most other industries, is facing a new world of work that will challenge HR. Conclusions from a 2020 survey and report from Deloitte indicate that insurance companies will need to strongly consider restructuring HR and talent management to remain competitive.

Additionally, insurance is increasingly a global business. As such, insurance companies are striving to provide a consistent, unified experience—not just for all of their customers but also for all of their employees. Especially in terms of retaining high-value employees, insurance firms need systems and processes that will power excellent service. Individuals must be able to find personally relevant HR information rapidly and to avail themselves of self-service options to take care of routine HR tasks.

For those more complex HR issues that don't lend themselves to self-service, HR organizations must be able to centrally and efficiently manage cases so they can be resolved quickly. Tied to that, employees should be able to follow the progress of cases they have filed.

In short, organizations in the insurance industry need an HR digital transformation to ensure employee satisfaction, increase organizational efficiency, and strengthen their competitiveness in a rapidly changing global market.
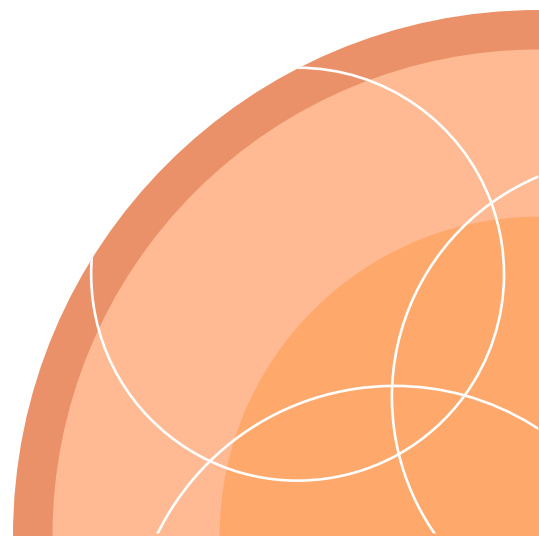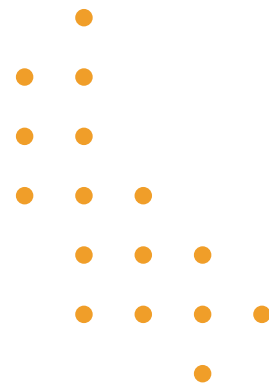
A multinational insurer grapples with HR challenges

A Global 500 insurer with more than 40,000 employees in more than 40 countries had been wrestling with the challenges described above. It prioritized providing high-quality, white-glove, concierge HR services to high-value employees in a special investment unit. However, legacy technology and processes were making it difficult to continue doing so efficiently. Meanwhile, its global HR system was fragmented, lacked a strong case management system, and provided an outdated HR portal experience for employees.

This global insurer operates a specialized, high-value investment unit of fewer than 1,000 employees that generates a significant amount of revenue for the company. Each of the employees in this unit is highly sought after, so the company places a high value on—and puts great effort into—retaining them. Leadership would rather these individuals focus all their attention on revenue generation, without distraction. Any time they spend chasing down requests for time off, or filling out information for medical benefits is time not spent generating value for the company.

Managing the concierge HR service was difficult, however, because it lacked an internal HR case management tool. This meant that case management processes were sometimes chaotic, especially for complex issues such as medical leave or termination. The supporting technology was also out of date. HR managed cases via multiple spreadsheets, which made it difficult to find and share information. There was little consistency and connection across HR services, making it nearly impossible for HR and employees to track case status. After an employee made a request, it would disappear into an informational black hole until there was a resolution.

In addition, HR leadership faced obstacles in tracking HR personnel workload. With case information trapped in spreadsheets, it wasn't clear how many cases representatives were managing, how long each case took to resolve, and whether the overall workload matched capacity.

On a broader, global scale, the insurer was implementing Workday as its HR back-end system, and in parallel, it wanted to update its digital door to HR with a modern portal that could provide a consumer-grade experience. The company's previous HR portal was based on a legacy collaboration platform that had a dated look and feel. Content was inflexible, and information was not tailored to employees' individual situation.

HR systems were also highly fragmented. Information resided in many different locations, and there were no search capabilities, which meant that employees often had to scroll through irrelevant pages before finding the HR data they needed. Also, because most of the tier-1 and tier-2 functions—accounting for 95 percent of all HR activities—had been outsourced to a third-party vendor, the insurer lacked a strong case management system.

The company wanted to bring more-complex HR cases in-house to provide a higher level of service, but before it could do this, it needed to build a team to manage them and provide a strong case management system to support the team. In addition, the insurer wanted to deploy a portal that would provide personalized HR information and an intuitive self-service system to improve employee satisfaction and reduce the number of requests to the third-party vendor.

Requirements for a high-quality employee HR experience

As the insurer began its search for a solution and a partner to help with design and implementation, leadership had several requirements that needed to be met. For the white-glove service at the high-value unit, the case management system had to enable HR personnel to resolve cases effectively and transparently. Plus, the employee experience needed to be seamless, with improvement in service quality.

As for global HR, the knowledge base and portal had to be personalized, so employees would see only information that applied to them. The portal had to have a modern, consumer-grade look and feel, and the employee self-service function had to be efficient and easy to use. Finally, the case management system needed to enable HR services that previously were covered by third-party providers.

Deloitte was chosen as the insurer's trusted advisor to design and implement the HR digital transformation. Together, the company and Deloitte evaluated the possibility of augmenting the use of the legacy collaboration platform and also considered designing a custom portal. However, they ultimately decided that they could achieve the insurer's goals most effectively and cost-efficiently with a ServiceNow deployment.

The insurer's IT organization already used ServiceNow, so the company was both familiar and pleased with the software vendor's platform. Deloitte worked with IT to enable HR to share an instance of ServiceNow that enabled case management and two intake channels—email and self-service—for the white-glove concierge service. For global HR, ServiceNow powered an intuitive portal with self-service and a personalized knowledge base that integrated with Workday. It provided an additional connection point to the insurer's outsourced providers and acted as a modern, end-to-end digital HR solution.

A modern consumer-grade HR experience

Deloitte helped the insurer deploy the solution, which quickly proved its ability to support high-quality, efficient HR operations that provided an excellent employee experience. The portal's modern look and feel increased the global adoption of Workday, because employees were far less likely to interact directly with HR personnel.

The incorporation of search into the portal, for example, replaces the cascade of links inside the legacy collaboration platform that employees previously experienced when looking for HR information. Employees can now search for relevant information and go from question to solution in three clicks or fewer, reducing and even eliminating the need to wait on the phone or for an email reply to get answers. And the seamless integration between Workday and ServiceNow means that employees can't—and don't need to—distinguish one application from the other, because the experience is so unified.

An exceptional employee experience was not the only benefit of the insurer's HR digital transformation. With case data no longer hidden in spreadsheets, HR managers of the concierge service can now understand how workloads measure up against capacity and more precisely measure performance. Also, self-service has been so popular with employees that the number of requests to the outside vendor plummeted, reducing in a significant cost savings.

Automation and a consistent HR system across the entire global organization also created efficiencies, in no small part because the cloud-based system is less expensive to manage and maintain. In addition, because case tracking and management immediately provide the full history of an employee's cases to HR personnel, they can offer employees more efficient and effective support.

The challenges the insurance industry have faced during the pandemic have been severe, and companies are likely to experience the repercussions for quite some time. HR digital transformation can provide the next-level employee experience, efficiency, and agility that insurers need in order to compete for and retain the talent they will need in the coming years.

Questions?

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