

Insurance Company

COLLECTIONS AND DISBURSEMENTS | SAP | SALESFORCE | PROCESS IMPROVEMENT

Insurance of the Future: Streamlining the Collections and Disbursements Process

The client wants to analyze the performance of their Collections and Disbursements processes within SAP CD and Salesforce as a basis to further optimize, streamline, and automate processes and activities.

Client issue

In 2015, Deloitte leveraged Process X-ray to pinpoint enhancement opportunities for the client. Over the subsequent 7 years, the client enacted numerous improvements. In 2022, the client sought an evaluation of advancements made in their **Collections and Disbursements (C&D) process**, along with a **baseline analysis** to highlight the process improvement opportunities.

Solution

With **Process X-ray**, Deloitte visualized the **end-to-end process** data for **three different systems** (SAP CD, SAP Broker, Salesforce), covering **9 different teams**. This enabled the team to assess the C&D process on improvement opportunities in the field of harmonization, rework and automation and variances in process execution of the different dunning variants.

Impact

The team managed to extract and analyze millions of transactions, covering three distinct systems, in a **short period of time**. This helped the team to validate improvements made over the past years. In addition, more than **25 concrete improvement** initiatives were identified across the 9 different teams. This serves as a basis to further optimize, streamline, and automate the process and activities.

3

Different ERP Systems

9

Distinct Teams

>25

Improvement Initiatives