Case Study:
Digital Document Management for Improved Compliance

Client

One of Australia's leading insurance providers engaged Astral as part of a digital transformation initiative, to prepare a Roadmap to enable the digital management of document workflows and correspondence management. Astral was also requested to conduct a Privacy, data protection and information compliance assessment.

Our role was to provide direction and define possible solutions to a range of business requirements, including:

- Managing compliance risks, especially in relation to data protection and Privacy
- Enabling automated digital management of claims processing and customer enquiries
- Defining technical options for process automation and document control
- Defining more efficient and effective mailroom management service models
- Comparing in-source and out-source service options and recommending an optimal solution

Strategic Directions

Astral engaged with business representatives to understand current information management processes, risks and issues affecting customer enquiry correspondence and claims management. We identified areas where digitization and automation could support business improvement and risk reduction, and prepared recommendations based on this.

A key focus was to identify information Privacy and data compliance risks across claims handling and management processes, and to recommend strategies to address these risks.

Recommendations included redefining document management frameworks to support compliance. We also provided direction on the development of new systems to enable the automation and application of required business rules. Ultimately, the purpose was to improve customer service by providing more accurate, transparent and timely processing of customer interactions.

To further imbed these changes, we defined options for the digital and automated management of correspondence, including mail and print-room functions. This included assessing internal and out-sourced service models. Based on our cost/benefits and risk analysis, a preferred option was identified.

These engagements provided our client with a clear strategic direction for digital enablement of core services. Based on our advice, our client was able to make confident decisions and investments to support their information compliance and business efficiency goals.

Benefits

- Identify and address Privacy, data protection and information compliance risks

- Improve business efficiencies through implementation of document management workflows

- Identify the most cost-effective and efficient approach to mailroom and printing management

- Drive a consistent approach to how customer-facing information is managed across the organisation

- Leverage digital toolsets to remove manual and error-prone approaches to document and mail processing

- Optimise ROI for investment in digital toolsets