

The Standard

Client: The Standard Insurance Company

Timeframe: 6 weeks

Role: Senior BIA, Operations Research

Team: Kaizen Experiences Team

Methods: Observation Studies, User Interviews, Primary Document Research, Workflow Mapping

Tools: CallMiner, R, Excel

Time: 2018

Introduction: The Standard was running on pure paper workflows until 2020, when the pandemic came. Suddenly, they faced both their old processes being unusable at the same time their claims reached record highs because of the pandemic.

Even when I came onboard in 2022, the long-term disability group was still struggling with long wait times, burn out, and staff retention issues. I was given a place on the Kaizen team to try to relieve some of the pressure on this team by finding low-hanging fruit: easily implementable tools, services or workflows which could help dig them out of their backlog.

Methodology: User Interviews, Primary Document Research, Observation Studies, Workflow Analysis

User Interviews: Two user interviews were conducted with front-line LTD processors by each of our three team mates to hear about front-line experiences about their workflow. The interviews were designed to gather information about the users' needs, behaviors, and attitudes towards the current system, with an emphasis on operational improvement.

Observation Studies: In addition to user interviews, we were each included in a Kaizen meeting. These were bi-weekly cadence meetings designed to give an outlet for team members to express frustrations and share best practices. We paid extra attention to interactions between users and their systems, mapping how information flowed from one system to another, and where manual tasks were needed.

Primary Document Research: A treasure trove of documentation on systems was available, including project notes from previous attempts to automate systems. With patience (and a lot of coffee), our team started working our way through the backlog of JIRA tickets, Sharepoint sites, Teams Task lists... and at least one email chain that had been printed out, marked up, scanned, and saved into a share drive.

Workflow Analysis: Once we gathered all of this information together, we took a deep breath, then started mapping the different processes our front-line insurance processors were using to do their work. We used Visio to create process flow maps, as well as Excel to note particularly complex processes. This worked with the Kaizen principles of visualization and documentation we were tasked with undertaking, and helped us understand all of the pain points we had encountered.

Outcomes: We were able to list a number of pain points, and propose features to relieve the friction our front-line agents were feeling. Because we had taken the time to go through the primary documents, we were also able to connect quickly with other company resources on low-hanging fruit. Since we had already visualized the issues, they were able to get up to speed quickly and prioritize the changes.