



# Collaboration for Insurers

## Accelerating the Pace of Work to Real Time

Insurance is dynamic. Facts, people, products and regulations are constantly in motion. Insurance is also collaborative. Collecting the latest piece of information from co-workers, product owners, outside parties and the like is 80% of the job.

In contrast to the tempo of the industry, technology in use by insurers generally excludes rather than includes people who need to exchange information and get work done together. Field sales people use Salesforce.com which is generally not integrated with home office systems and not accessible by people outside of sales. Loss control services in the field use spreadsheets and word documents which are generally not integrated with home office underwriting systems and not accessible by persons other than the author.

### **INSURERS ACKNOWLEDGE THE NEED TO BRIDGE WORK DIVIDES YET STRUGGLE TO FIND THE RIGHT TECHNICAL SOLUTION**

Getting work done in this dynamic and electronically disconnected environment is a challenge recognized by Insurers. Insurers have been using a host of different collaborative technologies to automate the flow of information and work tasks. All of them help in some way, but none have really solved the problem.

E-mail is often used as a collaboration tool. The challenge with e-mail is that it does not automatically provide the requisite context and usually does not have the requisite content. As a result, more e-mails are sent to fill the content to context gap. The other challenge with e-mail is that information and ideas exchanged via e-mail benefit only those who are part of the chain. Others working to resolve the same or similar activities may arrive at a different (and less favorable) outcome, resulting in inconsistent interpretation and execution of policies, procedures, and processes within the organization.

Instant messaging (IM) has been used as a real time “collaboration” tool. The good thing about IM is the acceptable brevity of conversation and the speed with which ideas or information is exchanged. However, IM faces the same challenges as e-mail in terms of the lack of content and context and the number of people who benefit from the exchange.

Content Management Systems (CMS) or knowledge management technologies are used as collaboration tools to increase the awareness of the many rather than simply benefit the few. Publishing content, however, assumes that the context of every situation fits neatly

into the four corners of a document with no variables introduced by the parties to the transaction, the product or changing regulations. CMS and similar technologies generally benefit only those inside a department or work group, not all of those involved in driving a decision or activity to done.

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Enterprise social platforms like Yammer and Jive aim to address all these weaknesses. Organizations have been quick to buy and implement these Facebook-like technologies. However, since these platforms stand alone and are disconnected from other core systems, people must initiate communications in order to add content and context. These extra steps rob these platforms of their value and adversely affect user adoption.

### **APPIAN'S WORK AUTOMATION PLATFORM CONNECTS THE PEOPLE, PROCESS AND TECHNOLOGIES INSURERS NEED TO GET WORK DONE WHEREVER AND WHENEVER**

In contrast, Appian's modern work platform enables efficient work and process management for all and instantaneous collaboration within and across functional areas through a secured enterprise collaboration system. Combined with deployment as native applications on all mobile platforms, Appian's modern work platform facilitates rapid and collaborative work execution. Appian provides the best of both worlds for an ever changing, dynamic industry.



Appian reduces time lags associated with the logistics of people and information by putting them both at the fingertips of the decision maker or the executor of work. Appian can automatically route tasks to a person or to a group for work completion at their desk or from a mobile. The tasks can be created by a system (i.e. a finance system that monitors dips in reserves) or a person (i.e. a sales person looking for someone with

experience in a particular type of account) as part of an activity or a case. The electronic case file can include links to graphs, documents, discussion streams, other related activities, and associate people responsible for the activity. Having context to what is being asked and access to the content needed to help form an opinion or act, decisions can be made quicker and work completed faster.

In summary, Appian's work automation platform is fitting for the tempo of the insurance industry. Appian's modern work platform that gets smarter and more valuable with every interaction between people, processes and technology, on the go or in the office.

## Appian

As the market leader in modern Business Process Management (BPM) software, Appian delivers an enterprise application platform that unites users with all their data, processes, and collaborations – in one environment, on any mobile device,

through a simple social interface. On-premise and in the cloud, Appian is the fastest way to deliver innovative business applications.

For more information, visit [www.appian.com](http://www.appian.com)