

## CASE STUDY:

# Hansard Global plc

Hansard Global plc is a specialist long-term savings provider, offering a range of flexible and tax-efficient investment products within a life assurance policy wrapper, designed to appeal to affluent, international investors.

Hansard utilizes a controlled cost distribution model by selling policies exclusively through a network of independent financial advisors, and the retail operations of financial institutions who provide access to their clients in more than 170 countries. The distribution model is supported by Hansard OnLine, a multi-language, scalable, internet platform.

The principal geographic markets in which Hansard currently services policyholders and financial advisors are the Far East, Latin America and the Middle East, in the case of Hansard International Limited, and Western Europe in the case of Hansard Europe Limited, the Group's two life assurance companies.

## CHALLENGE

Over the 25 years of Hansard's existence a number of disparate systems have either been acquired through purchase, or developed in-house to facilitate the operational business of the company. These systems have tended to be used to solve single business needs with little overlap and connectivity. One such system, Document Image Processing (DIP), was developed at Hansard at the time of its founding and the tools to maintain the code had been off support for a number of years.

The DIP system is integral to managing the vast number of documents generated and received on a daily basis; in excess of 2,500 on any working day. In turn, these documents generate work profiles across 450 operational functions. The DIP system was, nominally, a document repository that allowed staff to move documents between teams and individuals; the operational function of the document being managed through a checklist.

Hansard had spent two years developing an in-house system to manage activity around this document base, but realized that this system had reached its capacity. With the inherent risk of running their business on an unsupported platform and the difficulty of obtaining business insight into

operational activity, Hansard decided to look for a single solution to both problems.

## APPROACH

Hansard realized that they would be unable to support a complete rewrite of the 450 business functions while trying to mitigate the risk of an unsupported platform. It was therefore decided to port the existing platform into a new supported environment that would lead to better understanding of business activity.

They took this opportunity to remove legacy functionality, reduce internal email communications and also provide a more visible picture of what was really happening; putting them in a strong position for future BPM projects.

Hansard chose Appian's enterprise application platform to address business transformation for this critical area of the company. Hansard deemed the Appian platform as a process solution that could be rapidly developed and deployed to bring the benefits of modern technologies such as data management, social collaboration and easy access to their business.



### SOLUTION

An initial proof of concept was developed by the lead architect over a period of 3 months. Then, with a team of just four designers and a member of Appian Professional Services, Hansard was able to complete the initial design of the Hansard DIP Replacement System in just two weeks using agile development techniques. DIP Replacement enables Appian's process automation and fixed business rules to assign documents to appropriate groups across all Hansard departments. All functions of this modernized application can be accessed on leading mobile devices, enabling additional work efficiency for employees.

Documents are fed into the system after they have been scanned, or uploaded through the Hansard OnLine system available to their IFAs, and are then stored as a Record with related actions attached. Appian Records capabilities allow Hansard documents to be centrally located within the system, ensuring easy access and transparent view of work statuses. Depending on the document type, requests are automatically assigned to a particular group or area of the company such as premium management, client servicing and processing of new business.

A key aspect of the deployment is that an ongoing process is clearly visible, and all participants can now collaborate in an efficient manner by posting messages to the process owner(s). This dramatically reduces the need for unstructured internal email communication.

### RESULTS

The DIP Replacement System allows Hansard to fully leverage a modern application platform for financial service management. Improved data integration and analytics enable the organization to process more than 20,000 service and customer requests a day through the development of over 450 different record types. The platform has been well received internally with 75% of employees using Appian's modern interface for data collaborations. These collaborations are routed in structured business processes unlike traditional email-based communication.

DIP Replacement has allowed Hansard to accelerate workload management of internal resources, improve compliance management, and leverage a complete audit trail of actions and project statuses while using innovative collaboration methods.



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