



**A LEADING HEALTH INSURANCE PROVIDER IN THE UK AUTOMATES THEIR MULTI-LIFE UNDERWRITING PROCESS WITH MS DYNAMICS CRM**

### **ABOUT CLIENT:**

The client is a leading international healthcare company headquartered in the UK, serving over 38 million customers across the world. They also provide health provision services and operate clinics, dental centers and hospitals in many other countries markets.

### **INDUSTRY:**

Health Insurance

### **REGION:**

Europe

### **EMPLOYEES:**

85000

### **BUSINESS NEED:**

The client wanted to automate their Multi-Life Underwriting procedure.

# BUSINESS CHALLENGES

## 01

The client's existing application was based on legacy technology, and its maintenance was complex. There were multiple-systems involved in performing underwriting for prospects or existing customers which was time-consuming and inefficient.

## 02

The system needed to be more stable in the long term; it cost additional time and money on paperwork, training, and on-boarding. Additionally, manual data entry increased the risk of clerical errors, leading to rework, delayed decisions, and unhappy customers.

## 03

Poor integration with the core claim processing system & lack of automation-driven results based on current health assessment of prospects or existing customers added to the manual work required later on.

# DATAMATICS SOLUTION

Datamatics did a quick assessment of the existing client system and built an automation solution to handle all policy scenarios for Multi-Life Underwriting. Additionally, Metadata and transactional data were extracted from the old system into staging (SQL Server), transformed, and loaded into Online CRM using KWS (Kingsway Software) SSIS packages.

Business Rule Management System was integrated with the Online CRM application to automate the assessment of triage and medical condition for prospects or existing customers.

Canvas apps were configured for enhanced UX during multi-life underwriting. Additionally, 2 more apps were configured for Multi-life triage assessment and to handle medical condition assessment.

These changes were integrated with the claim system using a custom integration framework.

# BUSINESS IMPACTS



Easy integration with core claim processing system



Automated assessments of medical conditions based on rules engine



Easy to maintain metadata based assessment



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# ABOUT **DATAMATICS**

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