

Huge Efficiency Gains for Global Insurer After Switching to a Bespoke SharePoint WorkFlow by Influential

Formed through the merger of two global leading groups this insurance company has offices in cities worldwide, catering for an international network of clients. They empower the vast expertise of specialist underwriting teams to protect customers against ever-evolving risks. Their excellence is built on the strength of their client relationships and attention to detail across their 6 different insurance workflows. To ensure continued success their London HQ needed a cost-effective upgrade of the existing paper-based system, which was out-dated and fraught with limitations that affected their business.

The Influential development teams delivered a bespoke software solution that overcame the challenges the insurer was facing- and at a reasonable cost. A digital task manager system was built on the SharePoint 2013 platform to replace the existing system and modernise processes. Influential teams worked swiftly and efficiently to minimise disruption to the business and to ensure the new system catered for the complex processes of the workflows. The entire digital system was built within 8 weeks with an easy-to-use custom user interface.

Challenges

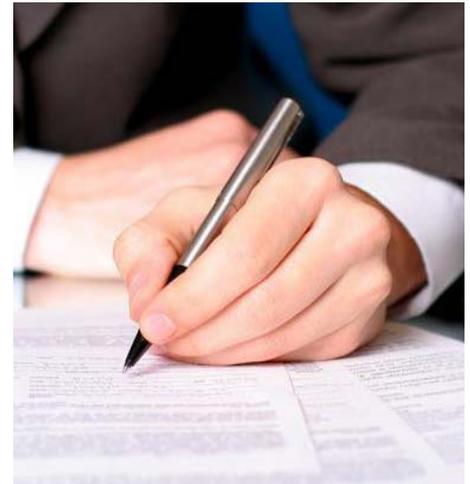
- Out-dated paper-based system efficient document filing and processing
- Insecure file storage with no backups
- No facility to track progress or monitor KPIs

Objectives Achieved

- Enhanced efficiency, boosted productivity, and instant, accurate breakdowns of workflow performance
- An all-new digital workflow that replaces current paper-based system in just 8 weeks
- A user-friendly UI on the SharePoint platform to handle the complex workflow processes

Benefits Going Forward

- Instant global document access, digital filing & processing with secure daily backups and a notification system for task due dates and deadlines
- Tracking & monitoring with real time reporting
- Enhanced efficiency, boosted productivity, and instant, accurate breakdowns of workflow performance
- Flexible, configurable, future-proofed system to roll out to the client's offices worldwide for 800+ users
- Influential is in talks with the client for system expansion to include enquiries and incident reports, with a host of new tracking and reporting features



“We needed an entire workflow system built from scratch and finished ASAP... Influential didn't disappoint.”

100% switch to digital workflow system in just 8 weeks

“The full, real-time reporting has revolutionised the way we do business... now we can see everything as it happens.”



SharePoint

Get in touch today to learn how Influential can help your business [↗](#)

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