# US-Based Insurance Provider Digitizes Their Process Design Document to Save 75% in Documentation Overhead and Scale RPA

Founded in 2002, this US-based insurance company provides managed care services for government-sponsored health care programs, focusing on Medicaid and Medicare. They also offer health plans for families, children, and the aged, blind, and disabled, as well as prescription drug plans.

## Company Profile

Industry: Health Insurance

Employees: 12,000+

Annual Revenue: $20 Billion

Customer Since:  2016

"We kept hearing that we needed to be using a PDD, which is only available as a word document. Everyone kept saying it was faster, but we were hesitant about using paper-based documentation. In the end, we said we'll do it and see if it's faster, but we'll do it in Blueprint."

- IT Manager

## The Challenge

This insurance provider were mandated to move from their current process of using BRD/FSD documents to PDD documents to define automated processes, which is only available as a word document. On average, it took a full working day to finalize a PDD and even then, they struggled to get process screenshots in line with steps.

The screenshots, which were critical for improving developer understanding of what was required, would show up as attachments at the end which was not useful because the developers still would have to flip back and forth through the documents. They quickly realized that their current documentation processes were flawed and prone to error, necessitating a more scalable way to translate business process requirements into technical requirements for their RPA development teams.

## The Solution

The insurance provider began working with Blueprint to leverage Digital Blueprints which contain everything needed to deliver a precise guide to bot developers including detailed process flows, functional and non-functional requirements, user stories, compliance and regulatory requirements, and both functional and acceptance tests among other critical information that can be instantly referenced. Since all critical information could be automatically generated or was stored in Blueprint's central repository and merely needed to be connected to the process, stakeholders were able to compile Digital Blueprints in 2 hours instead of 8.
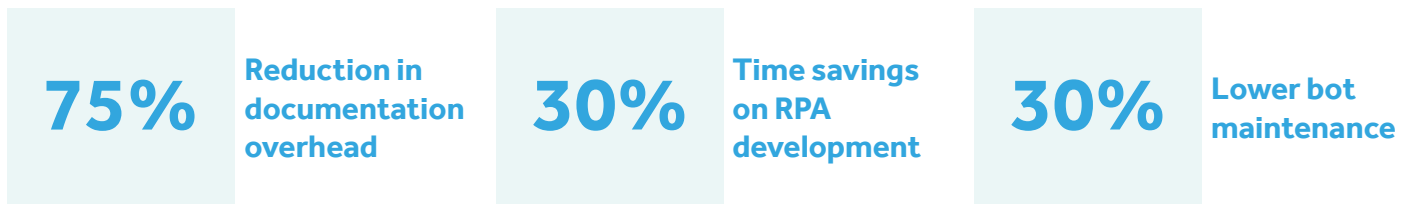
> "Once we received the additional 2 million members from a merger, in order to keep auditing 5% of the previous day's pharmacy benefits claims we would have had to hire an additional 6 full-time employees. Instead, we decided to automate the process and didn't have to bring on anybody new. We could keep our current staff size and go from a 5% audit to almost a 100% audit of the previous day's claims."
>
> - IT Manager

## Key aspects of the Enterprise Automation Suite that drove automation success:

- **Business Process Modeler** - The automation team was able to capture, connect, design, and optimize business processes to be aligned with organizational strategy, regulatory obligations, and automation objectives.
- **Impact Explorer** - Teams leveraged trace relationships and the impact analyzer to make change management easier. Trace relationships were used to relate critical information to business processes for automation, and the impact analyzer gave teams a complete visual map of all the processes a regulation is related to. This capability significantly reduced the risk of non-compliance.
- **Reviews & Approvals** - Prior to automation, stakeholders were constantly reviewing and fixing mistakes. With reviews and approvals built into the process, supervisors are now spending less time revising work and employees are spending more time on value-add tasks
- **Digital Blueprints** - The automation team leveraged Digital Blueprints that contain detailed process flows, functional and non-functional requirements, user stories, compliance and regulatory requirements, and both functional and acceptance tests among other critical information. Their Digital Blueprints were automatically pushed into the RPA tool they used for developers to reference and guide precise development.

## Benefits Achieved

| **75%** Reduction in documentation overhead | **30%** Time savings on RPA development | **30%** Lower bot maintenance |
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## The Results

Replacing PDDs with Digital Blueprints saved this insurance provider 75% in documentation overhead. The improved quality of context and speed at which Digital Blueprints can be produced has also allowed the company to deliver and develop processes for automation 30% quicker. The rich and complete context of Digital Blueprints led to a 30% decrease in bot maintenance costs because higher-quality bots were built the first time.