



Process Automation Helps an Insurance Aggregator Save Substantial Man-hours on Daily Data Gathering and Reporting Process

CASE STUDY

Customer: An insurance aggregator

Size: 51-200 employees

Location: The United States of America

Industry: Insurance

Profile: A membership-based leading insurance aggregator

Services: Process Automation

Business Need

The client, a leading insurance aggregator serving world's top 50 insurance carriers, accesses multiple carrier websites every day for data gathering and reporting. Agents who are responsible for these tasks manually log-in to each carrier website, filter daily records, generate reporting logs in PDF format, and send logs for further processing to the corresponding backend teams. On average, each agent downloads over 30-50 files, segregates them based on file types, and sends the data to the intended recipients.

The client wanted to fully automate the data gathering and reporting process so that they can:

- Reduce manual efforts
- Accelerate speed of data gathering
- Ensure the defined process is followed at all times
- Eliminate the possibility of manually-induced errors

Solution and Approach

Synoptek began the engagement by assessing the existing data gathering and reporting process. We analyzed videos and workflows documents provided by the client to understand how each carrier website works. We also spoke to relevant stakeholders to identify roadblocks that brought down the efficiency of the process.

To develop the automation script, we analyzed each carrier website one by one and estimated the effort required to automate the process for each of them. After approval from the client on the plan and effort hours, we started work on the automation script. The automation script was written in the programming languages – Python and Java, and executed on the automation platform – Selenium.

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The script, coupled with a Windows scheduler, automates the end-to-end data gathering and reporting process. It also triggers the automation script for each website daily at defined intervals. With the script in place, the following tasks are completely automated:

- **Data gathering and reporting:**
The auto-bot logs into carrier websites, filters daily records, generates reporting logs in PDF format, and sends the data to the intended recipients.
- **Summary reports:**
Summary reports including details of successful and unsuccessful tasks, exceptions encountered by the script, list of exception records, and exception email for any unexpected failure are generated every day.
- **Password update:**
For each carrier website, log-in credentials change on a frequent basis. The change prevents bots from logging into the websites. The script is, therefore, designed to read the updated passwords from a SharePoint site every day, use updated passwords for logging onto the websites, and then destroy the password records for security reasons.

Synoptek is now working with the client to create an automation script for fetching records uploaded on a carrier website after the bot has already fetched data for the defined period.

Business Results

Using the Process Automation script, Synoptek has completely automated the data gathering and reporting tasks for 22 websites so far. The automation assignment, which was completed in less than 6 months, has a considerable impact on the business.

- The client has experienced a 72% reduction in manual 'touches' on the carrier websites (from 14,000 manual clicks monthly to 4,000 manual clicks monthly).
- The manual execution of tasks involved efforts from 3 clerks daily. Automation has reduced the number of clerks involved in these efforts by 50%.
- With nearly zero manual intervention at any stage in the daily process, the possibility of manually induced errors has gone down to 0%.

About Synoptek

Synoptek is a global systems integrator and managed IT services provider offering comprehensive IT management and consultancy services to organizations worldwide. Founded in 2001; headquartered in Irvine, CA, we have offices and resources across North America and delivery centers in Asia.



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