



**Softtek**<sup>®</sup>

**CASE STUDY** | INSURANCE

# Business process automation clears insurer's 3-month invoice backlog in 3 days

[softtek.com](https://softtek.com)





# About the customer

A best-in-class insurance claims management service provider who offers loss adjustment and risk management services across various service types, including property, casualty, third party administration, and crisis management response.



**200+ offices  
around the world**



**90 years  
in operation**



**1,500+  
employees**





# Business challenges

Our client's manual invoicing process was time-consuming, involved many manual steps and many employees. For example, a single bottleneck during the extraction, validation, or management of appeals and exceptions for a batch of claims could often halt core business functions and cause issues in the accuracy of reconciling receivables, generating downstream impact in cash flow forecasting.

1

Recapture the manual time needed for rework by identifying and eliminating common errors to streamline the processing of over 1,000 daily invoices.

2

Optimize the customer invoice submission process to improve cash flow.

3

Enable invoice status monitoring within customer systems to ensure timely remittance from insurers.

4

Resolve invoice generation backlog.



# How Softtek comes into play

With over 20 years of automation experience and effective change management practices, Softtek became our client's BPO partner and was given complete ownership of all invoicing processes by leveraging our innovative nearshore model. With this shift, Softtek helped our client scale, meet the demand of claims fluctuations, and stabilize its back-office operations, bringing new speed and accuracy to their accounts receivable function.

This goal was accomplished by identifying workflow candidates ripe for optimization and then implementing robotic process automation (RPA) by creating Bots synergized with SharePoint workflows. With the extraction, validation, end-process notification, and reporting of exceptions covered by Softtek's bots, our client was able to quickly move from an environment with a growing invoice backlog to a reliable and scalable system able to fast track payments with same-day invoicing at incredible and reliable speed.





# Business impact

This strategic partnership represented a big win for the company; now their human workforce can focus on essential initiatives while benefitting from accurate invoicing, lower overall costs of payment processing, a flexible and scalable system to meet claims demand, and a partner committed to delivering ongoing value.



Cleared a three-month invoice backlog in three days.



95% of AR transactions processed without a human intervention.



Reduced rework level to near zero percent.



99.95% accuracy on taxes, language, and expense receipts.



70% reduction in invoice disputes—due to outdated rates.



#### ABOUT SOFTTEK

Founded in 1982 by a small group of entrepreneurs, Softtek started out in Mexico providing local IT services, and today is a global leader in next-generation digital solutions. The first company to introduce the Nearshore model, Softtek helps Global 2000 organizations build their digital capabilities constantly and seamlessly, from ideation and development to execution and evolution. Its entrepreneurial drive spans 20+ countries and more than 15,000 talented professionals.

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