

From drowning in paperwork to doubling efficiency: How a legal protection insurer turned claims processing into competitive advantage

EXECUTIVE SUMMARY

- Large European legal protection insurance provider serving clients across multiple regions
- Legal experts were spending majority of time on administrative tasks rather than legal analysis, resulting in slower case processing and declining customer satisfaction compared to competitors
- Intelligent workflow automation platform implemented to automate routine tasks while preserving human decision-making for complex legal analysis
- Flowable platform integrated with existing legal databases and regulatory systems to create unified workflow environment
- 50% reduction in case processing times, significant improvement in customer satisfaction scores, enhanced employee satisfaction and productivity
- Transformation from operational constraint to competitive advantage, with scalable foundation for continuous improvement

BUSINESS PROBLEM

When legal expertise drowns in administrative chaos

A leading European legal protection insurer faced a critical operational challenge that threatened its competitive position and growth potential. Despite having skilled legal professionals and comprehensive training programs, the organization consistently fell behind competitors in customer satisfaction surveys.

Legal experts were consumed by administrative tasks that had nothing to do with their core expertise. Legal analysts spent hours each day navigating between multiple systems to gather case information, manually transferring data between platforms, and creating documentation that should have been generated automatically from existing information.



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The root cause was clear: their legal experts were consumed by administrative tasks that had nothing to do with their core expertise. Legal analysts spent hours each day navigating between multiple systems to gather claims case information, manually transferring data between platforms, and creating documentation that should have been generated automatically from existing information.

This operational inefficiency was creating a cascade of problems throughout the organization. Even straightforward claim cases took significantly longer to process than necessary, while complex cases became exercises in information archaeology, frustrating both staff and customers. The organization’s most experienced professionals found themselves drowning in administrative tasks rather than applying their legal knowledge effectively, while newer team members struggled to navigate the complex web of systems required for even basic claims processing.

CHALLENGE

Fragmented systems forcing legal experts into administrative roles

The insurer’s operational challenges were embedded in its technology infrastructure and resulting workflow designs. Each claim required legal professionals to access numerous databases and applications to build a complete picture of the case, forcing them to become system administrators rather than focusing on the legal analysis that truly required their expertise.

The organization faced several interconnected challenges that compounded their operational difficulties:

Fragmented Information Systems:

Case data was scattered across multiple platforms with no unified view, requiring manual data gathering and synthesis for every case. Legal professionals spent more time hunting for information than analyzing it.

Inconsistent Process Execution:

Without standardized workflows, case handling varied significantly between team members, leading to unpredictable processing times and quality levels that made it challenging to manage customer expectations.

Limited Visibility and Control:

Management lacked real-time insight into case status, bottlenecks, and resource utilization, making it difficult to optimize operations or predict capacity needs for strategic planning.

Scalability Constraints:

The manual, fragmented approach made it nearly impossible to handle increased case volumes without proportionally increasing staff, creating a ceiling on growth potential that threatened long-term competitiveness.

The organization needed a solution that could integrate with existing legal databases and regulatory systems while providing the flexibility required for complex legal cases, all without disrupting ongoing operations or compromising compliance requirements. Crucially, there was a need to become able to scale operations up and down during claims surges and scaling — with the existing team.



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SOLUTION

Intelligent workflow automation that amplifies legal expertise with customizable case management automation

After extensive evaluation of automation platforms and pilot testing with real cases, the transformation team identified Flowable as the partner to support their vision for intelligent claims processing.

The transformation began with a fundamental reimagining of how intelligent automation could serve, rather than constrain, legal expertise. Rather than accepting limitations as inevitable consequences of complex legal work, the leadership team made a strategic decision to create an intelligent, integrated system that would amplify human capabilities by handling routine tasks while preserving the nuanced decision-making that legal professionals provide.

The solution centered on several key innovations that addressed their core operational challenges:



Intelligent Workflow Architecture: Sophisticated workflow capabilities now adapt to the complex decision trees and variable processes that characterize legal protection insurance. Rather than forcing legal work into rigid templates, the intelligent system learned from the actual decision-making processes used by the most experienced professionals.



Unified Information Environment: Frictionless integration between existing legal databases, customer systems, and regulatory reporting platforms now eliminates the need for manual data gathering while preserving access to all necessary information sources.



Automated Routine Processing: Intelligent automation handles routine tasks like data gathering, document generation, and case routing while escalating complex decisions to appropriate legal experts based on case characteristics and complexity. Automation enhances rather than replaces professional judgment.



Process Intelligence and Optimization: Deep visibility into how cases move through the organization now reveals bottlenecks and inefficiencies that were previously invisible in the fragmented system. Continuous optimization occurs based on real performance data rather than assumptions.



Strategic Implementation Methodology: The implementation focused on transforming the most challenging process first; comprehensive legal case analysis, which involved coordination between multiple specialists and extensive research across various legal databases. This approach proved the solution's capabilities while building organizational confidence.



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Flowable created an environment where legal professionals could focus entirely on analysis and decision-making. At the same time, automated systems now handle all routine data gathering, documentation, and case management tasks, transforming the relationship between technology and expertise.

BENEFITS

Doubling efficiency while elevating professional satisfaction

The intelligent automation solution exceeded every performance target the leadership team established when launching the transformation initiative. Flowable helped deliver measurable improvements across operational, customer, and employee satisfaction metrics, fundamentally transforming the organization's competitive position.



Operational Excellence Achieved

Case processing times were reduced by 50% across all case types, while the organization doubled its operational efficiency without increasing headcount.

The solution eliminated manual data transfer between systems, creating standardized case handling processes that ensured consistent quality across all team members.

Management gained real-time visibility into case status and resource utilization for the first time, enabling proactive capacity planning and optimization decisions that were previously impossible.



Customer Experience Transformation

Customer satisfaction scores improved significantly as the intelligent automation solution delivered faster response times for all claim types while making case resolution more consistent and predictable.

Enhancing efficiency reduced customer inquiries about case status through proactive communication capabilities, creating a more transparent and responsive service experience that strengthened customer relationships and competitive positioning.



Professional Satisfaction and Enhanced Capabilities

The transformation had a positive impact on employee satisfaction and capability utilization. Legal professionals could finally focus entirely on analysis and decision-making rather than administrative tasks, reducing the stress and frustration that had previously characterized claims processing.

Higher job satisfaction followed as experts could apply their knowledge without operational constraints, while improved case quality resulted from the consistent application of legal expertise across all cases.



Strategic Advantages and Organizational Impact

The solution created a virtuous cycle where improved efficiency enabled the organization to handle more complex cases effectively, establishing a foundation for continuous process improvement and optimization. Scalable operations grew without proportional increases in administrative overhead, taking claims processing from an operational necessity into a genuine competitive advantage.

The intelligent automation solution fundamentally changed the organization's entire approach to legal protection insurance. Cases now flow smoothly through automated workflows that gather relevant information, identify applicable precedents, and prepare comprehensive case summaries for review by legal professionals. The system's learning capabilities continuously improve case routing and decision support, making the entire organization more intelligent and responsive over time.

The overall transformation demonstrates what is possible when legal expertise meets intelligent automation. Customer satisfaction and professional fulfillment reach new heights, competitive advantages become sustainable that compound over time, and teams are built where expertise truly matters.

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Five proven strategies for intelligent claims transformation

The transformation achieved by this legal protection insurer demonstrates that intelligent automation offers a proven approach for turning professional services into competitive advantages.

The journey from fragmented processes to automation requires vision and commitment, but the results speak for themselves.

When legal expertise meets intelligent automation, both customer satisfaction and professional fulfilment reach new heights. Organizations that embrace this transformation don't just improve their operations; they redefine what's possible, create sustainable competitive advantages that compound over time, and build workplaces where expertise truly matters.

- 1. Start with process intelligence:** Map existing workflows comprehensively before designing automated solutions, ensuring automation enhances expertise.
- 2. Design for expertise amplification:** Select platforms that free professionals to focus on activities while automating tasks.
- 3. Build integration from the foundation:** Choose technology that connects seamlessly with existing tools.
- 4. Implement with complex cases first:** Begin transformation with challenging processes to prove capabilities and build confidence.
- 5. Measure professional impact alongside operational metrics:** Track efficiency improvements and satisfaction to ensure that automation enhances the overall experience.