

Enabling Resilium to Save 20+ Hours Per Week in Refund Requests Triage

Resilium

Resilium Insurance Broking stands as one of Australia's leading authorised representative networks helping customers with business and personal insurance. The organisation embarked on a journey to transform a key process in their operations. ONGC's specialists came up with an automated email triage solution, which helped them to successfully achieve this ambitious goal.

The Objective: Optimise the Insurance Refund Process

Resilium sought to improve their existing manual process of handling insurance refunds, which was:

Time-Consuming

- Staff had to manually review approx 80 refund requests each day.
- Sending multiple emails for various approvals was also done manually.
- This was not only costly and inefficient, but also limited the amount of refunds processed each day.

Prone to Human Error

Staff had to access multiple different systems to validate information and triage requests. This increased the chances of mistakes.

Lacking in Scalability

As the business continued to grow, the manual process became increasingly difficult to manage. The organisation needed a solution that could handle an increasing volume of refund requests without the need to proportionally increase staff.

These challenges branched out into smaller issues that impacted:

• Customer Satisfaction

The lengthy processing time negatively impacted the customer experience. Refunds often extended well over the service level agreements (SLAs), which led to customer dissatisfaction.

• Operational Overhead

The need for staff to access multiple systems to validate information and triage requests added additional labour overhead.

The Solution: Business Process Automation (BPA)

ONGC built an automated solution using Microsoft's Power Platform, where:

1. Emails would instantly be triaged as soon as they are received.
2. The system would read the form submitted in the email.
3. The refund request would be automatically sent to the appropriate managers for approval.
4. If the refund was under a certain dollar amount, and data matched their CRM system, the solution would automatically approve the refund.
5. If the refund request was over a certain dollar figure, the system would then escalate the request for human review, so the refund request can be finalised.

Automating the Process Involved Several Steps

1

Understanding the Existing Process

ONGC started by thoroughly understanding Resilium's existing insurance refund process. They analysed the workflow, identified pain points, and assessed the impact on the business. Their findings became the basis for their recommendations, which included ONGC's extended suggestions that went beyond what the organisation expected.

2

Solution Design & Implementation

ONGC's team designed and built the triage automation solution. Power Platform was identified as the most appropriate tool to streamline the process, based on integration capabilities, scalability, and cost-effectiveness.

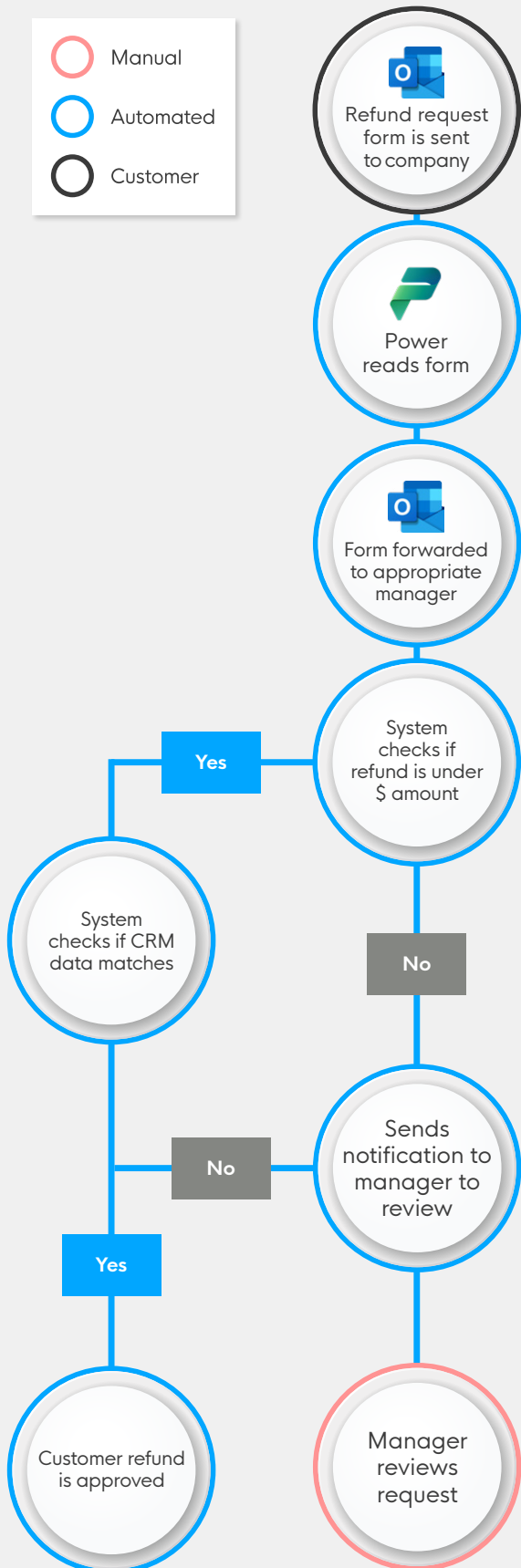
The custom automation was carried out using Power Platform's low-code development environment.

3

Testing & UAT

ONGC conducted extensive testing to ensure the solution met Resilium's requirements and delivered the desired outcomes. Testing involved:

- **Unit Testing**, to ensure that individual components of the automation solution function correctly
- **Integration Testing**, to verify that different components work together seamlessly
- **Regression Testing**, to ensure that existing functionalities remain unaffected and help catch unintended side effects
- **User Acceptance Testing (UAT)**, so end-users can validate the solution by simulating real-world scenarios, and issues and bugs could be identified
- **Performance Testing**, to assess performance under various loads
- **Security Testing**, to check security aspects (e.g., access controls, data encryption, authentication) and prevent vulnerabilities
- **Accessibility Testing**, for accessibility compliance
- **Documentation and Training**, for end-users and support teams
- It was critical to ensure the solution could handle a variety of refund request scenarios. These were handled through careful planning, extensive testing, and close collaboration with Resilium.



The Outcome: Benefits Gained from the Automated Refund Triage

What advantages did the business gain from automating the refund request process?



1. Faster Refund Processing

The automation runs faster than the manual process followed before, and it runs even after hours. This way, Resilium is saving 20+ hours per week. The majority of refund requests are now being processed within 24 hours vs. the previous timeframe of 2-3 working days.



2. Reduced Administrative Burden

The time saved per week translates to reduced administrative workload for the staff. Now they have more time to focus on value-add tasks, improving overall productivity and job satisfaction.



3. Enhanced Customer Satisfaction

Resilium continues to receive good feedback from customers, indicating that they appreciate the streamlined refund process. Positive customer experiences contribute to brand loyalty and trust, repeat business, and potential referrals.



4. Better Operational Efficiency

The automation eliminates manual errors and ensures consistent handling of refund requests. Therefore, Resilium now operates more efficiently, reducing costs associated with errors and rework.



5. Improved Scalability

The solution can handle a higher volume of refund requests without proportional staff increases. Because of this, the company is in a better position for future growth without compromising service quality.

Working Smart & Moving Forward with Optimism

The organisation plans to continue leveraging automation to streamline other areas of operations, such as outstanding invoice payments. They are keen to automate other processes and scale their business without having to add headcount.

To learn more about automation solutions for your business, check out ONGC's Business Process Automation Services.

[Business Process Automation Services](#)

"Automating our refund request process has been a game-changer for us. It's a perfect example of working smart, by investing in technology that eventually allows our business to grow further. ONGC's expertise was priceless. They did not withhold vital knowledge even if it went beyond the original scope, knew what they were doing, and gave us regular updates. If you have a situation similar to what we had, it's time to assess the issue and collaborate with automation experts."

Sarah Fox

Resilium's Operations Manager

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