

Improved accuracy & efficiency of quality audits in disbursements for Property Insurance

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Customer



A leading provider of specialty insurance

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Business Challenge



1. Quality audits performed manually using multiple excel sheets and Microsoft Access-based tools made it difficult to consolidate and analyze data

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Business Impact



1. Input files for quality audit received through emails, data was distributed and collated through Excel files & shared/ stored in excel format
2. Managing workflow & reporting was time consuming as data stored in multiple excel files
3. Checklist not followed strictly in audits

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Solution and Execution



The Copasys® solution - a centralized QA platform which supports:

1. Assignment of data (once uploaded) through Copasys to different auditors; auditors perform the audit & save the results on the platform. Reports generated through PowerBI and exported, thereby reducing several manual steps.
2. All audits results stored on the Copasys platform, eliminating the need for storing data in excel files.
3. The audit has a step-by-step flow so that none of the mandatory checks are missed, ensuring accuracy of audits.
4. Ease in generating various reports for management review

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Business Value



1. Increase efficiency by eliminating manual steps in workflow management
2. Improve accuracy in audits
3. Manage data & report audit results efficiently through a centralized platform