

The image features a night cityscape with a digital overlay. The overlay consists of glowing blue lines and icons representing technology and finance. The icons include a smartphone, a dollar sign, an envelope, a laptop, and a tablet. The lines form a network structure, with some lines connecting to the icons. The cityscape in the background shows illuminated buildings and a highway with light trails from traffic. The word "Purple" is written in a large, white, serif font across the top center of the image.

Purple

CHANGE & TRANSFORMATION IN INSURANCE

ABOUT ME



Background

- 20 years experience within technology
- 10 years experience as a consultant

Experience

- C level appointments for mid and large market systems integrators
- Overseen small and large business transformations
- Worked closely with major providers on new and disruptive technologies



Alistair Sergeant – CEO - Purple



We are the first choice for clients who look for radical outcomes that facilitate transformational change through the appropriate alignment of people, process, technology and culture.

WHAT WE DO



Strategy



CUSTOMER EXPERIENCE



TRANSFORMATION



OPERATIONAL



TECHNOLOGY

Business Transformation



BUSINESS PROCESS



CHANGE MANAGEMENT



ORGANISATIONAL DESIGN



PROCUREMENT

Technology Transformation



CYBER



CRM/ERP/DIGITAL



DATA



INFRASTRUCTURE



UNIFIED COMMS

THE UNICORN



INDUSTRY CHALLENGES



Siloed Data

An icon representing siloed data, showing two separate buildings. The left building has a grid of '1's, and the right building has a grid of '0's, symbolizing disconnected data systems.

Demand for Automation

An icon representing the demand for automation, showing three hands reaching up towards several interlocking gears.

Poorly Integrated Systems

An icon representing poorly integrated systems, showing a chain link connecting a desktop monitor and a smartphone.

Regulation

An icon representing regulation, showing a clipboard with a large checkmark inside a circle.

Brexit

An icon representing Brexit, showing the European Union flag (a circle of stars) with a white arrow pointing to the right.

Manual Legacy Processes

An icon representing manual legacy processes, showing a spiderweb overlaid on a grid pattern.

Self Service

An icon representing self-service, showing a hand touching a smartphone screen that displays a shield.

Products to Specialise

An icon representing products to specialise, showing a shopping cart with several stars above it.

Mergers & Aquisitions

An icon representing mergers and acquisitions, showing two hands shaking in a firm grip.

Skills Shortage

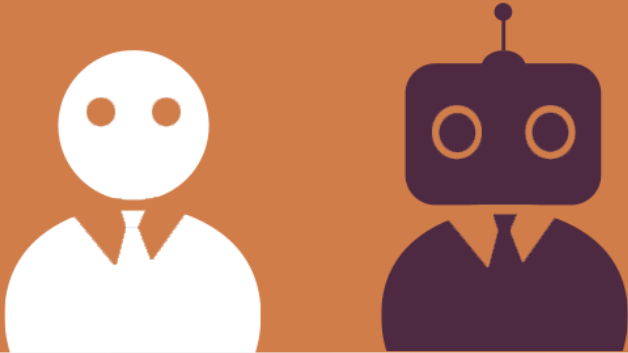
An icon representing a skills shortage, showing three question marks above three stylized human silhouettes.

Cyber Security

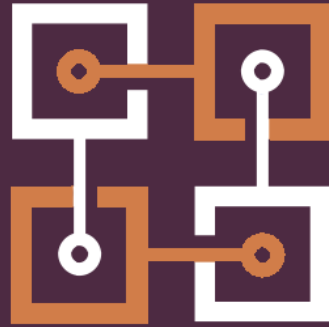
An icon representing cyber security, showing a globe next to a padlock.

Purple
Delivering Transformation Together

Automation will replace human effort across the entire insurance value chain



The **Blockchain** era has begun and there will be a rapid shift from pilot to production of

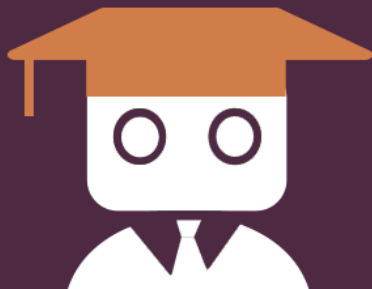


distributed ledger technology

Insurance premiums will become highly personalised due to tech based insight



Machine learning tools are making analytics more effective, saving time and money



IoT devices such as telematics in cars are now able to calibrate quotes based on changing factors like driving safety









Purple
Delivering Transformation Together

DIGITAL TRANSFORMATION



Purple

Objectives

		Operational Efficiency	Improved Customer Experience	Speed To Market	Sales Productivity	Underwriting Efficiency
Enablers	 RPA	✓	✓	✓	✓	✓
	 Data Insight	✓	✓		✓	
	 System Integration	✓	✓	✓		
	 Blockchain	✓	✓	✓		✓
	 CRM	✓	✓		✓	
	 Omni Channel	✓	✓		✓	✓

Purple

Delivering
Transformation
Together

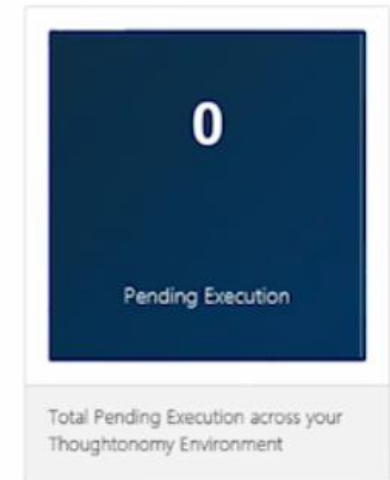
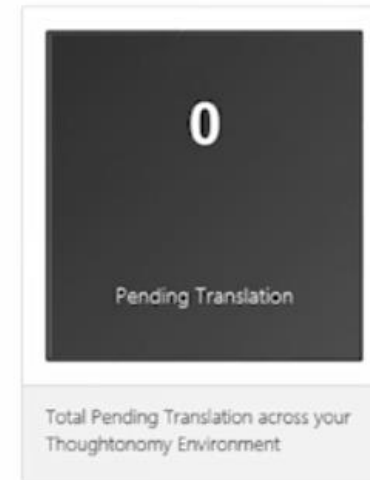


CASE STUDY

RPA OVERVIEW



THE RISE OF THE BOT



RPA OVERVIEW



On December 18, 2017 the support policy for this browser with Lightning Experience is changing. See Extended Support options for Internet Explorer 11.

Edit AnyCo Inc

*Account Name: AnyCo & Co

Account Owner: Gary Coates

Type: Partner

Parent Account: Acme (Sample)

Website: www.AnyCo&Co.com

Phone: 0191 123 4567

Description: AC10569925b

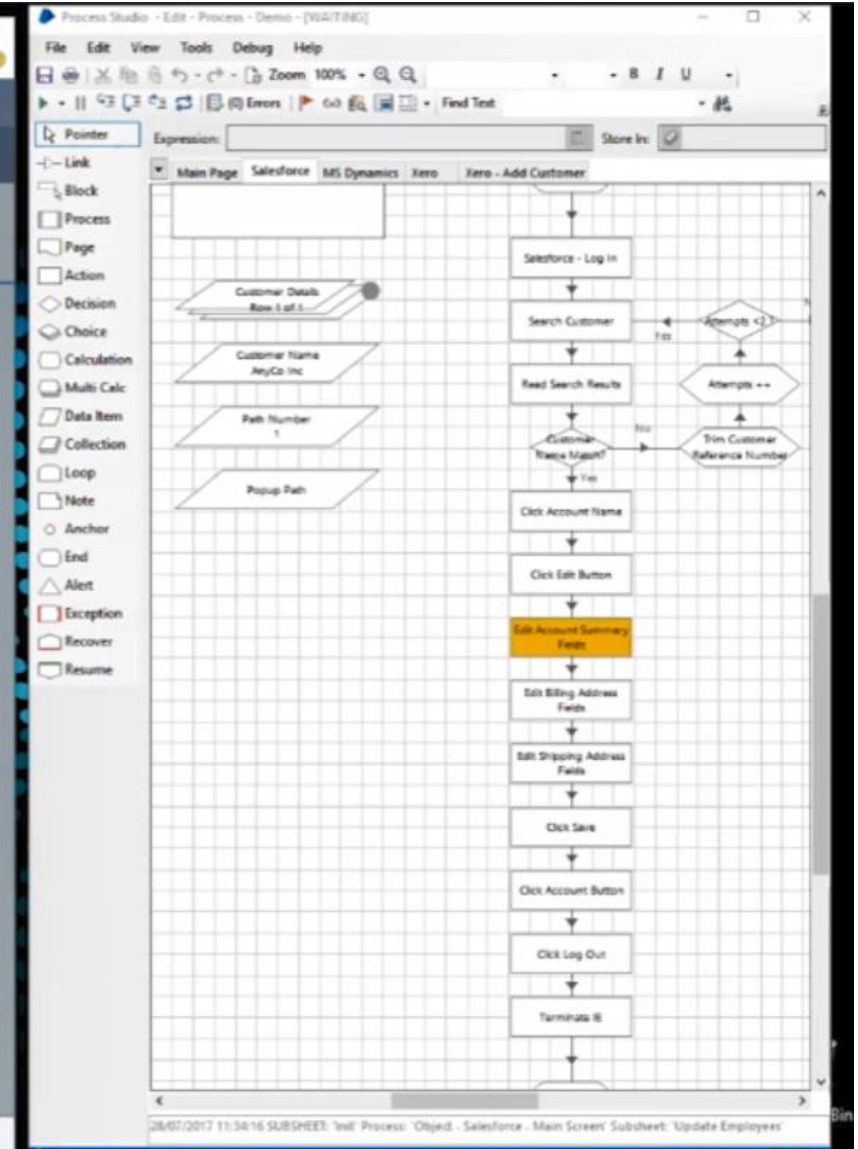
Industry: Banking

Employees: 200

Account Summary

Opportunity Amount by Stage (Sample)

Cancel Save & New Save



RPA OVERVIEW



The image displays two side-by-side screenshots. The left screenshot shows a Dynamics 365 dashboard for 'Customer Service Representative...'. The right screenshot shows the Process Studio RPA workflow editor.

Dynamics 365 Dashboard Data

Case Upsell Leaders

Owner	Count
Amy Alberts L.	4
Kelly Kroul L.	3
Allie Bellow	3
Carlos Grito	3
Christa Gelle	2
Dan Jump (Sam)	4
David So (Sam)	2
Arne Weiler L.	3
Serdar Sezgin	8
Eric Gruber L.	4
SYSTEM	7

Case Mix (By Origin)

Origin	Count
(blank)	2
Email	3
Web	5

Case Mix (By Priority)

Priority	Count
(blank)	1
Maintenance	5

Case Mix by Incident Type

Incident Type	Count
(blank)	0
Maintenance	2
Other	2

Process Studio RPA Workflow

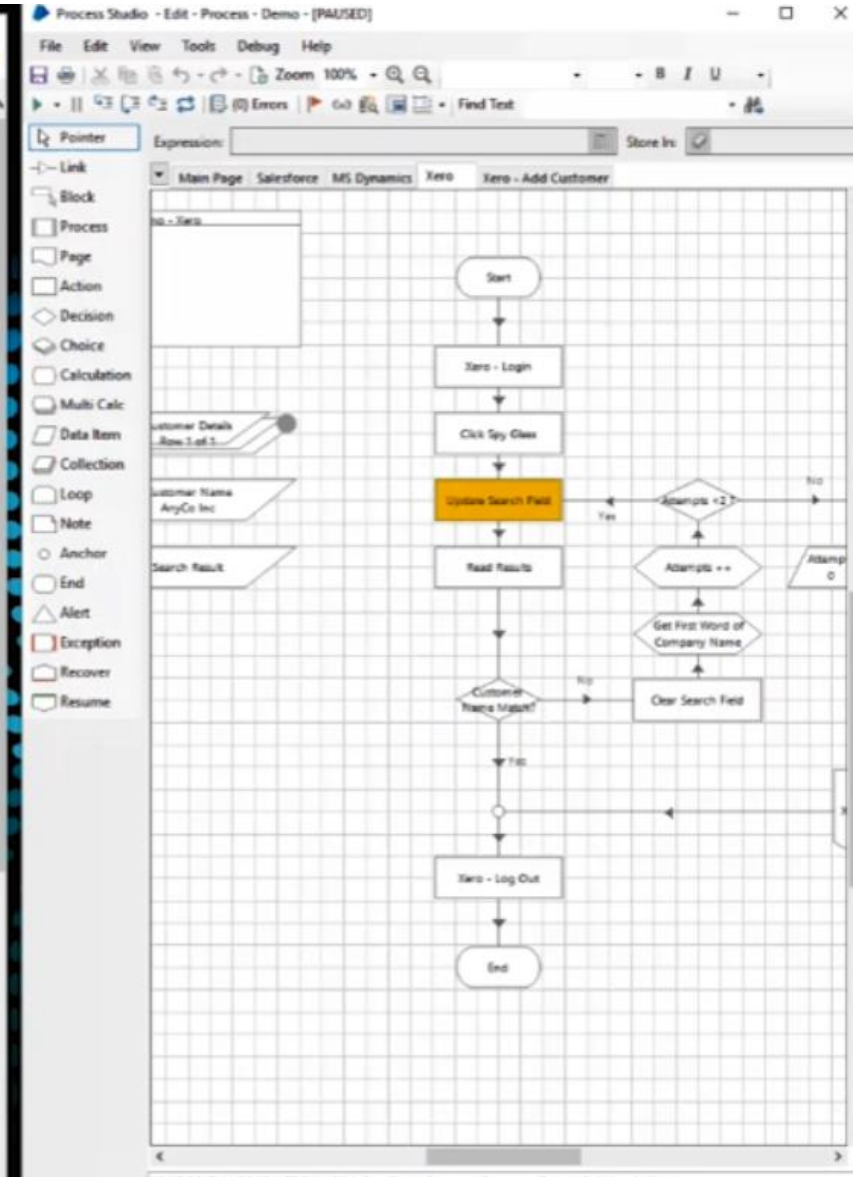
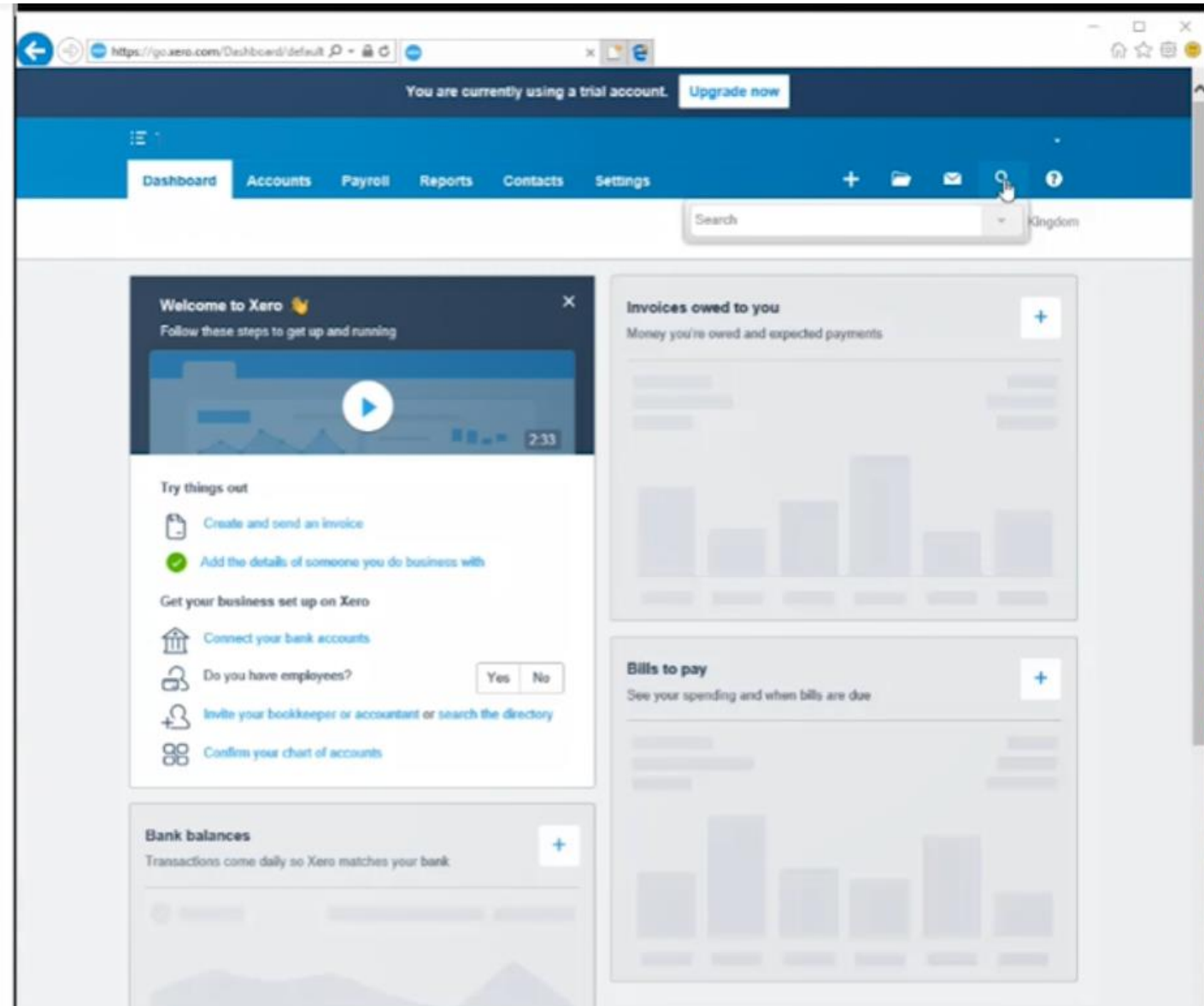
The workflow is titled 'Process - Demo - MS Dynamics' and is designed to add a customer in MS Dynamics. The steps are as follows:

- Start
- MS Dynamics - Login
- Navigate to Accounts
- Search Company
- Decision: Found Company? (Yes/No)
- If No: Attempts < 2, then Attempts ++, then Get First Word of Company Name, then Go to Company Details, then Update Company Address, then Click Profile Button, then Click Sign Out, then KR E, then End.
- If Yes: Get First Word of Company Name, then Go to Company Details, then Update Company Address, then Click Profile Button, then Click Sign Out, then KR E, then End.

The workflow includes an input table for company details:

Company Name	City	State
AnyCo Inc	New York	New York
Work bridge	New York	New York
1305 Tower	1305 Tower	10002
Address Line1	Address Line1	Country
Address Line2	Address Line2	United States
Address Line3		

RPA OVERVIEW



Purple

THE THREE AREAS WHERE IT WENT WRONG

A group of five business professionals in a modern office setting with large glass windows. The scene is backlit by a bright light source, creating a silhouette effect. The individuals are engaged in various activities: one woman is walking while holding a folder, a man and woman are looking at a smartphone together, and a man, woman, and another man are gathered around a table, looking at a document. The floor is highly reflective, mirroring the people and the bright light. The overall atmosphere is professional and collaborative.

**The most dangerous phrase in the language
is “We’ve always done it this way”**

DEFINED APPROACH



1. Vision

The first step on this journey is to identify the purpose and if it supports the overarching business strategy.

Defining this will help you justify the business case not only to the board but to the employees also.



2. Insight

- **Experience** - Assess and document the customer journey & experience
- **Process** - Document existing processes
- **Technology** - Audit and document the current technology landscape
- **People** - Skills & training needs

Phase 1



3. Improvement

- **Experience** - Define the future customer journey & required experience
- **Process** - Develop To-be processes
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- **People** - Define a training & communication plan



4. Selection

The selection process is more than just identifying a supplier, you need to identify a partner. Somebody that has understood clearly what you are about, what you are trying to achieve and can articulate clearly how they will support you getting there from product alignment and organisational cultural fit



5. Design

- **Experience** - Map the To-be journey and implement KPIs
- **Process** - Complete detailed To-be process design
- **Technology** - Provision technology
- **People** - Complete training & maintain engagement

Phase 2



6. Benefits Realisation

Often missed but without doubt the most important part of this exercise should be how you train and adopt this transformation into the hearts and minds of the organisation but also to understand and recognise the value that has been delivered to ensure the overall programme met the original outlined business vision

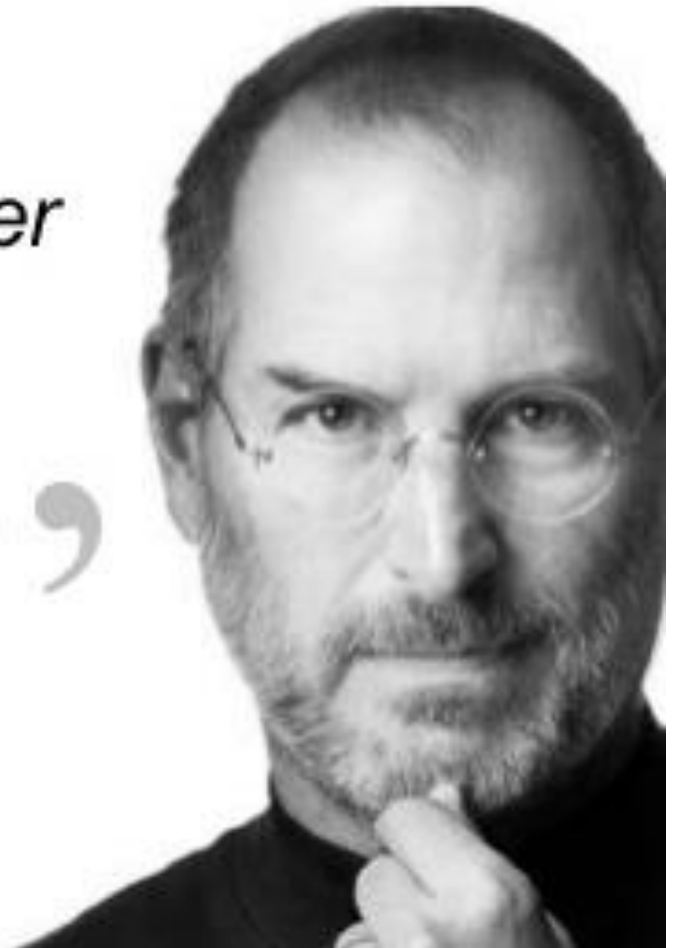
Phase 3

CUSTOMER CENTRIC ORGANISATION



“ *You've got to start with the customer experience and work back toward the technology - not the other way around.* ”

Steve Jobs, May 1997



KNOWING YOUR CUSTOMER



KNOWING YOUR CUSTOMER



COURSE DELEGATE

MARK CUTLER

OPERATIONS DIRECTOR

BIO

Mark is the Operations Director for the business that his father built. Mark has his sights set on becoming MD and is pushing the company forward into period of rapid growth as they gear up to start exporting.

They have hired lots of new staff and Mark is concerned about Brexit. They have recently taken on some NEDs.

Mark is on the board of directors and wants to strengthen his understanding of the role. He seeks to speak with more authority when engaging with the board.

Mark works in London and lives in Surrey.



London

40 YEARS OLD

MEMBER

MANUFACTURING

AT WORK

PAINS

- Is acutely aware that he doesn't know what he doesn't know
- Time-poor, too hands-on
- Cashflow and staffing are adding strain
- Needs to be able to engage with others on the board as an equal

JOB TO BE DONE

- Set operational strategy
- Design and deliver strategy
- Find out how to run an export business financially and legally
- Make strategy plans for Brexit
- Leading his team through change
- Consider how he will backfill his role if he becomes MD

GAINS

- Build a network of peers and take a more objective view
- Lead the new strategy effectively
- Know his own strengths and weaknesses as a leader
- Able to challenge and learn from new NEDs
- Feels there is progress towards becoming MD

RELATIONSHIP WITH ORG X

EXPERIENCE

- Has been a member for 3 years
- Has visited business centre in London to carry out client meetings
- Has attended regional events about Brexit
- Has access to other branch as an affiliate
- His father was a member of 'Org X'

TOUCHPOINTS

- Website
- Receiving email newsletters
- Regus Lounge in airports
- Calling Business Centre

VALUE

- Better skills and confidence
- Understand legal and financial responsibilities
- Can go back to his company as a change agent
- Be better at identifying, assessing and mitigating risks
- Benchmarking against his peers



ORGANISER AND DELEGATE

SELINA ANDERSSON

HR DIRECTOR

BIO

Selina is a new HR director in a global energy company which is headquartered in the UK. She has held similar roles before. She is on the board, however, the board is not functioning well and the chair of the board has requested that she should take steps to fix it.

Selina is arranging some training with 'Org X'. The training will be delivered to board members and directors. The aim is to get everyone aligned and energised for change.

The next step may be to train senior management to pave the way for succession planning.



Birmingham

34 YEARS OLD

NON-MEMBER

ENERGY SECTOR

AT WORK

PAINS

- The board is being ineffective and is unable to make decisions
- She feels pressure to make an impact through her project
- Short timescales, wants to turn the training around quickly to deliver value
- She doesn't yet know the company very well

JOB TO BE DONE

- Get advice from 'Org X' about what would be suitable
- Find out the requirements her company needs to meet
- Organise the training logistics via her team
- Set KPIs on any specific company pain points

GAINS

- Have a strong position in the company
- Improve her own professional development/ CV
- Understand her company very well
- Work with a functioning board

RELATIONSHIP WITH ORG X

EXPERIENCE

- Has no previous experience of 'Org X' but the Company Secretary recommended them
- Has high expectations of quality and professionalism
- Didn't know 'Org X' did training

TOUCHPOINTS

- Website (initial research)
- Directly with 'Org X' sales team
- Proposal document and other documentation
- Delivery team at 'Org X'
- Course tutor

VALUE

- Board is aligned, energised to change and functioning more effectively
- Board has had independent expert advice
- Company is ready to start succession planning with Senior Management Team

MEASURING THE EXPERIENCE



STAGE	1. Course promotion	2. Delegate registration	3. During course	4. Post-course
CORE STEPS	Align marketing with "Org X" Define dates for the year	Create list of delegates Send ID# to delegates Send list to "Org X" Send joining instructions to delegates	Manage delegate attendance list Ensure evaluation forms are completed	Assist delegates with exam booking
AD-HOC STEPS	N/A	★ Support delegates with Learning Zone access issues	N/A	★ Support delegates with queries ★ Share any complaints with "Org X"
EMOTIONS	No marketing materials from "Org X" Confirmation of dates It would be easier if I had editable versions of marketing material Calm, looking forward Promoting course	Late issuing of ID# Delegates can't access the right module on Learning Zone Annoyed at delays and mistakes from "Org X" Why does it sometimes work but not always? Resolving issues	Good, it's all going well Gets Evaluation from from FTP	Queries from delegates Concern about delegates' experience in exams I hope the exams go OK Send attendance list and evaluation form to "Org X"
STORIES	We would like a portal, where delegates can see their registration details, modules they are registered as taking, trigger their own exam registration, access their exam results, any communication from "Org X" in one place	Sometimes delegates experience a long delay in being added to the e-learning system and we may need to be persistent in chasing this up with "Org X" to get this remedied.		
TOUCHPOINTS	☎️✉️	☎️✉️	☎️✉️	☎️✉️
PITFALLS	✖ Delegates may get conflicting comms from "Org X" and franchise inc. course pricing	✖ ID may be sent late ✖ Access to Learning Zone may be incorrect or limited	N/A	N/A
POSITIVES	+ The course is excellent and very well received + Franchises can often engage "Org X" UK tutors	+ Giving access to all 5 modules at once is a good improvement in the Learning Zone	+ Courses are very good	+ Delegates give good feedback on course
OPPORTUNITIES	🔧 Provide early access to editable marketing materials for franchises	🔧 Provide an online course management portal for the delegates 🔧 Improve/automate processes to reduce delays and mistakes	🔧 Create online Evaluation forms	🔧 Keep Franchises up to date with planned changes to process and systems
PROCESSES				

STAGE	1. Exam selection	2. Delegate registration	3. Exam preparation	4. Exam day	4. Post-exam
CORE STEPS	Select exams from schedule Confirm selection with "Org X"	Send the delegates details of the exams to register on Support delegates with booking queries	Support delegates with any questions about exams	Be available to field queries from delegates	Respond to queries from delegates
AD-HOC STEPS	★ Support changes as needed	★ Support exam changes for delegates	★ Support exam changes for delegates	★ Liaise with "Org X" and TestReach as needed	★ Support re-sits
EMOTIONS	Please could you confirm your exam dates? I have to also arrange some resits from the last cohort Liaising with previous delegates	Delegates not booking on A bit stressed I wish I could easily see who has booked on Have you booked your exam? Chasing up delegates	Delegates want to practise in advance Stressed I am not confident that all the delegates will have a good experience	Delegates unsure on how to use the exam system On edge about how it will go Liaising with "Org X" and TestReach	When will I get my result? I wish I could easily know what is going on with "Org X" Liaising with "Org X" and delegates
STORIES	Exams now exclusively online, which has created issues with delegates who signed up before the change was made.	We are in a difficult position explaining to delegates that they are not able to take exams in a manner or location that all are comfortable with. A significant minority of delegates have dropped out.	Some delegates commented that booking and paying for the online exams has been difficult and inflexible (office hours only, phone going unanswered).		
TOUCHPOINTS	✉️☎️	✉️☎️	✉️☎️	✉️☎️	✉️☎️
PITFALLS	✖	✖ Delegates may not book on in time ✖ Booking by phone	✖ Delegates only get 2 weeks' advance access to familiarise themselves with the exam system	✖ Delegates may have technical problems or see problems on the exams	✖ Exam results often sent late in the day ✖ Delegates do not know what to expect
POSITIVES	+ Good choice of exam dates	+ Delegates are able to make their own bookings	+ None	+ Online exams are more flexible	+ None
OPPORTUNITIES	🔧	🔧 Give franchise an exam management portal 🔧 Send automated reminders to delegates about exam booking 🔧 Give delegates an exam + course management portal	🔧 Give franchise an exam management portal 🔧 Give delegates a practise area that they don't need a booking to access 🔧 Give delegates an exam + course management portal	🔧 Give delegates a practise area that they don't need a booking to access	🔧 Give franchise an exam management portal 🔧 Give delegates an exam + course management portal
PROCESSES					

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Phase 3

A NEW WAVE OF LEADERSHIP - DIGITAL LEADERS



Daily income per employee per hour by department

Logistics costs

Construction 100 \$

Marketing 97 \$

Gold	65
Platinum	62
Silver	48
Copper	39
Steel	25
Beryllium	18
Textiles	15

re of the of participants by quarter

Quarter II

Quarter III

Quarter IV

3 4 5 8 9 10 11 12 15 16 17 18 19 22 23 24 25 26 28 30

IMPLEMENTING A CHANGE PROGRAM



CHANGE BRINGS DIVIDE



ADOPT CONTINUAL IMPROVEMENT

CULTURE IS COACHED NOT INSTRUCTED

ALLOW FAILURE TO HAPPEN

PEOPLE WILL BE CONCERNED

CREATE AN INNOVATION TEAM

**“TECHNOLOGY ALONE WILL NOT DELIVER
DIGITAL TRANSFORMATION”**

BACK TO THE UNICORN



DIGITAL STRATEGY STARTING POINT



- Experience over technology
- Become customer centric
- Become a Digital Leader
- Create an Innovation Culture
- Encourage mistakes
- Change only comes with people's hearts and minds
- Take your time
- Enjoy!



**“DIGITAL TRANSFORMATION
IS FUNDAMENTALLY JUST
PEOPLE TRANSFORMATION”**

Thank you

Purple

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