Overview

Formed in 1997 from the merger of Lloyd Thompson and Jardine Insurance Broker, Jardine Lloyd Thompson (JLT) is an international group of Risk Specialists and Employee Benefits Consultants. JLT is listed on the London Stock Exchange and is one of the largest companies of its type in the world. JLT had a 2010 turnover of £746 million with 6500 employees across 34 countries. The EB Group within Jardine Lloyd Thompson (JLT EB) made up £132 million of this 2010 turnover with 1500 employees in offices in the UK and India.

Customer

Jardine Lloyd Thompson

Type of Customer

- Risk Management
- Employee Benefits
- Consulting

Challenges

- Needed the capability to support complex synergistic acquisitions with the addition of large quantities of users

How we solve

- Improved document handling by allowing direct integration into the overall flow via scanning, EDMS, and BPM
- Created forms to allow users to modify flows at runtime which gives users flexibility to control their work
- Implemented the DCC Application which automates a lot of processes such as Create Work, Ad Hoc Requests and Queries, Transfers, etc.
Since 2004, JLT EB used process automation to increase top line revenues by selling new solutions while maintaining low costs. This legacy of success became a critical asset when merging together multiple acquisitions between 2008-2010.

In 2009, JLT acquired HSBC Actuaries and Consulting Limited (HACL), a leading employee benefits and actuarial consulting firm with £40M in revenue. The acquisition was considered highly synergistic, extending JLT EB’s capabilities in areas such as Defined Benefit, Defined Contribution and pension consultancy and solutions.

At the time of acquisition, HACL had a complex, business-rule driven system and associated EDMS for process automation. After doing a rigorous technology review, JLT EB decided to keep its current BPM platform and make a large investment in extending that infrastructure to enable both increased sales and reduced costs. Usage would go from a few hundred people to >1200 daily users.

The BizFlow Solution

BPM allowed JLT EB to innovate in the following areas:
- Sales—demonstrating architecture flexibility through customer demonstrations
- Document Handling—direct integration into the overall flow via scanning, EDMS, and BPM
- Customer Service—quickly solving customer issues while tracking overall progress with ad-hoc user collaboration
- SLA Management—methods to manage SLA compliance and reporting capabilities
- Compliance—‘indexing’ of incoming documents with relevant meta-data and the initiation of relevant business processesBizFlow’s Do-Check-Complete (DCC) Application

The DCC application supports many processes including: Create Work, Notice to Staff, Ad Hoc Requests and Queries, Direct Offer associated flows, Transfers, and Annuities. Sub processes include Pending, Termination, and Document Handling.

Forms have been created to allow users to modify flows at runtime. Users have a lot of flexibility to control work and change work in progress. In order to incorporate more functionality and data access into the application while simplifying the user experience, JLT EB decided on a tabular form divided into top and bottom sections each with associated tabs.

Organizational Benefits

- ✔ 50% growth in trading profit in 2011
- ✔ Successful on-boarding of new acquisitions with 50% fewer employees
- ✔ Replacement of redundant systems
- ✔ Time saving due to “codeless” BPM suite (not having to write and maintain code)