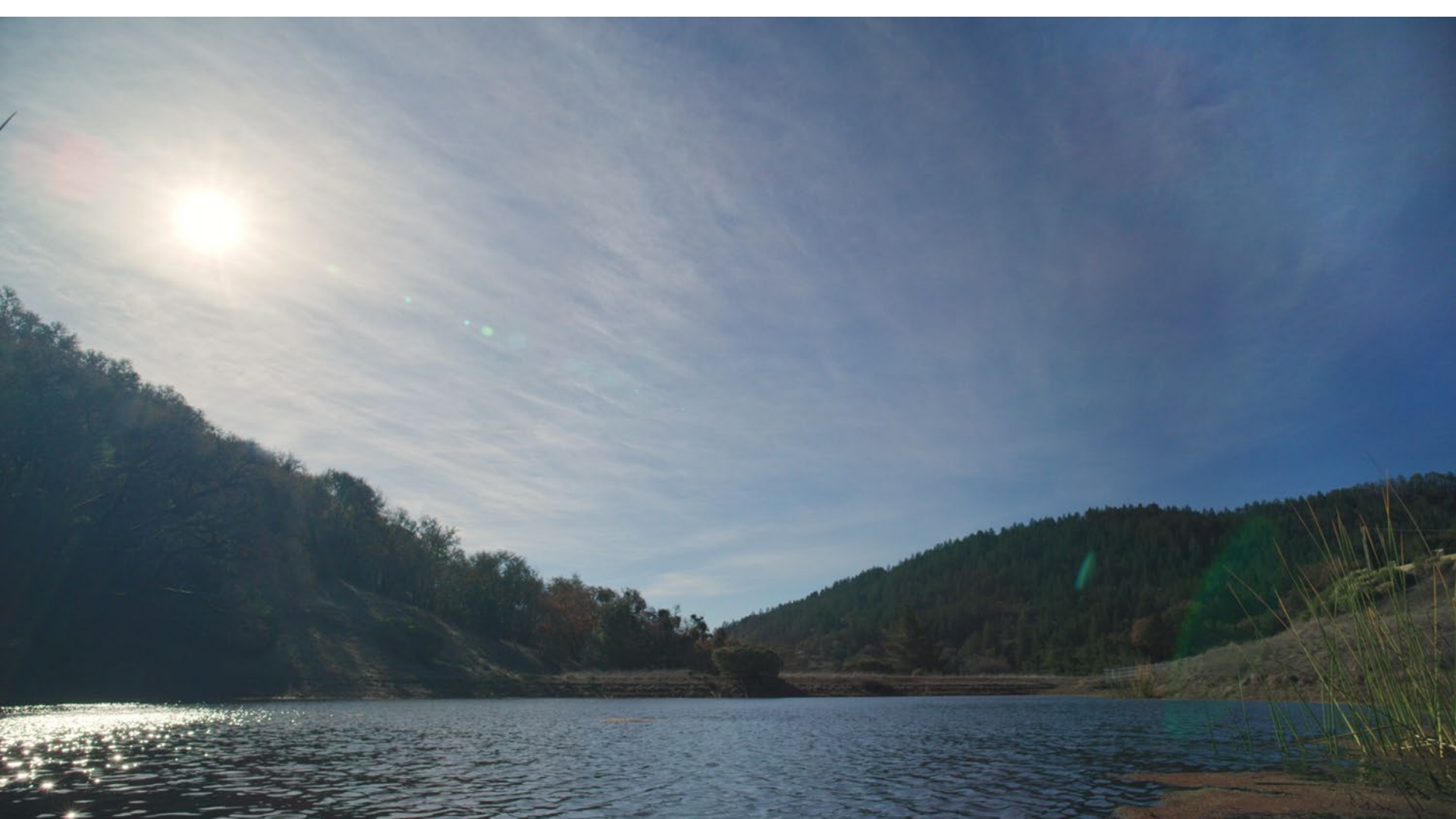


# Pragmatic Digital Transformation On A Shoestring Budget In Just 12 Weeks

Melissa B. Harris, IT Delivery Director  
Dwight Sell, Sr. Product Owner  
Unum Group



PW  
19



# We've got the stats

*(because insurance people love stats)*

Protecting nearly  
**30M**  
people and  
their families<sup>1</sup>

**#1**  
in the Individual  
Disability market  
in the US<sup>2</sup>

Received the highest  
score possible

**100%**

on the Human Rights  
Campaign Corporate  
Equality Index<sup>3</sup>

**4.7**

out of 5 stars – 97% of reviewers  
recommend our products<sup>4</sup>

**\$5.8B**

in benefits paid  
in 2017<sup>1</sup>

Named one of the

**“Best  
Places to  
Work”**

in 2018 by the Disability  
Equality Index<sup>4</sup>

A sole focus  
on benefits for

**170**

years<sup>4</sup>

Ranked

**267**

on the  
Fortune 500<sup>5</sup>

**1 IN 3**

companies on the Fortune 500 offer  
Unum benefits to their employees.<sup>5</sup>

1 Unum Internal Data, 2017.

2 LIMRA, 4Q 2017 U.S. Workplace Disability Insurance Inforce, 2018. Based on inforce premium. This number includes Unum US, Unum UK and Colonial Life divisions.

3 HRC.org, Human Rights Campaign Buyers Guide, 2018.

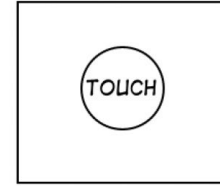
4 Unum Internal Data, 2018.

5 Fortune, Fortune 500, 2018.

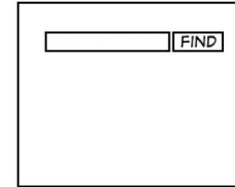


# Guess who needed a digital transformation?

TYPICAL APPLE PRODUCT...



A GOOGLE PRODUCT...



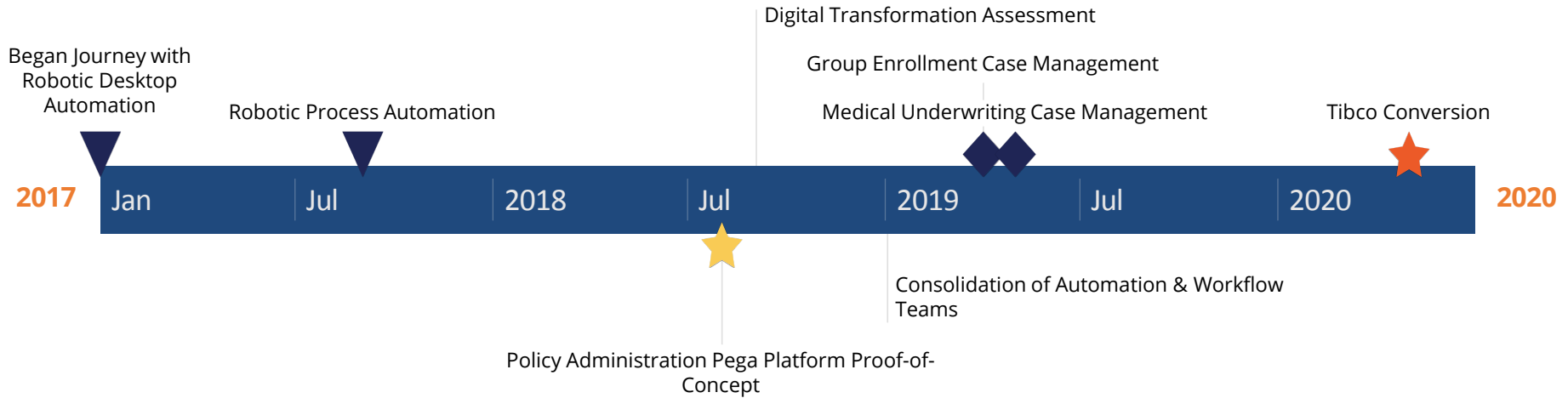
YOUR COMPANY'S APP...

FIRST NAME:	<input type="text"/>	TYPE CD:	<input type="text"/>	4 - K
LAST NAME:	<input type="text"/>	TQP STAT:	<input type="checkbox"/>	AA2-
SSN:	<input type="text"/>	FT/PT:	<input type="checkbox"/>	DK9B
ID:	<input type="text"/>	VER:	<input type="text"/>	KKA?
PHONE 1:	<input type="text"/>	CAT CD:	<input type="text"/>	CN3
PHONE 2:	<input type="text"/>	CITY:	<input type="text"/>	AA-9
ADDR 1:	<input type="text"/>	STATE:	<input type="text"/>	NEW
ACCT #:	<input type="text"/>	ZIP:	<input type="text"/>	DEL
		ORD #:	<input type="radio"/> <input type="radio"/> <input type="radio"/> ? <input type="radio"/>	
OKAY APPLY SAVE UNDO HELP DELETE EDIT				
SELECT BROWSE ERRORS				

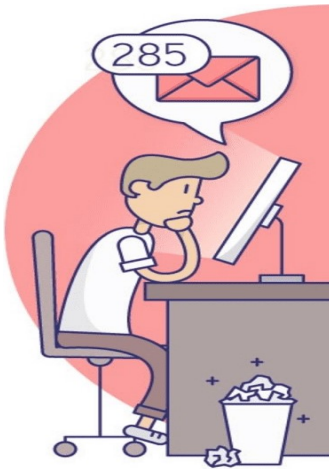
*Close to actual representation of Unum's Current Systems*

STUFFTHATHAPPENS.COM BY ERIC BURKE

# unum<sup>®</sup> Journey With Pega



# Our First Initiative – Gain Control & Visibility in the Back Office Operation



**VB POLICY ISSUE**

Paper    Plane    Hosting

Date received:

Number of elections:

Processor:

Case Name:

Stakeholder ID:

RBCN:

Platform:

Field Office:

Deduction Starter:

IS/IM:

BC:

Vendor:

Apps received via:

Submitted by:

Original submit date:

[Click here to attach a file](#)

Processor	Method	Case Name	Stakeholder	Plan#Number	RBCN	Enrol	Status	Complete Dt	PEO	Start	End	Test
	Paper						Completed	5/1/2018		3/1/2018		365
	Plane			101508			Completed	5/1/2018		4/1/2018		365
	Hosting					Partia	Completed	5/1/2018		1/1/2018	4/1	365
	Paper						Completed	5/1/2018				365
	Hosting					Partia	Completed	5/1/2018		1/1/2018	4/1	365
												13306

# Our First Initiative – Gain Control & Visibility in the Back Office Operation

**Start Issue Process**

**Work Item Details**

Group Rate Identifier: [redacted] Event Type: NLOC  
 Arrived Date: 04/25/2019 Deadline Date: 08/26/2019  
 Case Name: [redacted] Implementation Manager: [redacted]  
 Field Office: ST. LOUIS SALES OFFICE Sales Rep: [redacted]  
 Process Display Identifier: [redacted] Paper Only: No  
 Process Display Name: [redacted] 2019 ENROLLM... Enrollment Solution: Electronic

**Note:**

**Release Work Item**

Are you sure you want to release the work item?

Yes No

**Action Text**  
 Enrollment start date has been reached and case is ready for manager is received.

Release Issue Process Complete

Enterprise Enrollment Platform (Ground Control Production) - [Service Process: Employer Management -

File Edit Window Help

Enterprise Enrollment Platform (Ground Control Production)

Employer: [redacted]

Available Service Process: [dropdown]

Service Pro...	Action	Status	Result	UserID	Started	Stopped
MapAp...	MapAp...	Complete	Success	[redacted]	4/26/2019 9:09:35 AM	4/26/2019 9:09:36 AM

Copy To Clipboard Detailed Summary

Service Process ID: [redacted]  
 EmployerID: [redacted]  
 Service Process Action: MapApplications  
 Service Process Source: Config  
 Service Process Destination: Config  
 Service Process Result: Success  
 UserID: [redacted]  
 Started: 4/26/2019 9:09:35 AM  
 Stopped: 4/26/2019 9:09:36 AM

Service Process Level Messages:

Type: WorkflowMessage  
 Status: Success  
 Message: Signal Workflow Completion - Successful

Service Process Summary Level Messages:

Type: WorkflowSummaryMessage  
 Status: Informational  
 Message: Application Mapping Summary  
 Applications Mapped: 3  
 Mapping Errors: 0



# Where did we land

Policy Issue (PI-943) **OPEN-MERGEVBCP** R0420372 ADI ALL PRODUCTS AUG2018 Final Date : 06/01/2019

17 days from now

StepInstructions  
Please Make Sure to Check Paper Only=No

Business Process Display ID: 1178697601121  
Enrollment Event Name: DEMO  
RBCN: R0420372

**Merge Status(Robot)**  
Merge Result:  Success  Error Merge Date:

Apps Successfully Mapped:  Mapped Apps Failed:

Robotic Automation Status:

Case Notes:

**Merge Results**

Create Date	Result	Mapped Successfully	Mapped Errors
No items			

Buttons: Cancel Save Save Only Submit

from manual processing and validation...

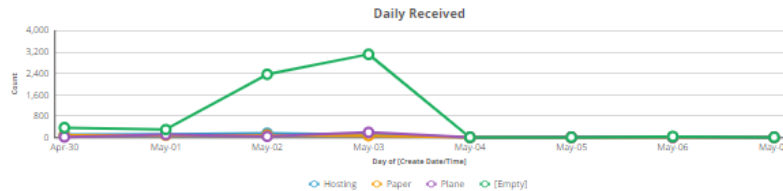
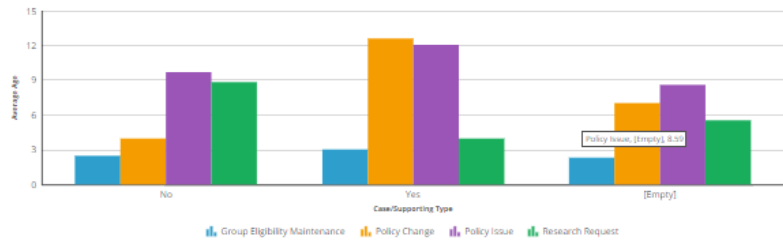
to robotic supported straight through processing and service oriented validation

13.2% improvement in work item production per team member

# After 12 Weeks...

Case stages for Policy Issue

Intake (79)	Process (1185)	Validate (58)
Intake	Process - VB Policy	Validate



## Team members

SS	Hosting VBCP	61
JE	Paper	57
BS	NCG - Incoming Corresp/Ben Changes	30
JG	Hosting	22
DS	Plane, Research	21
SW		20
DC	Hosting Classic & VBCP	17
VG	Hosting/Research	17
A		15
WG	NCG - Hosting changes and rework	12

[See all \(165\)](#)

## Work queues

NCG_PC - Non Enrollments Process Queue	423
VBDueTomorrow_ProcessQueue	377
Hosting Process WorkQueue	365
PC - Non Enrollments Process Queue	178
Plane Process WorkQueue	134
Pending Queue	133

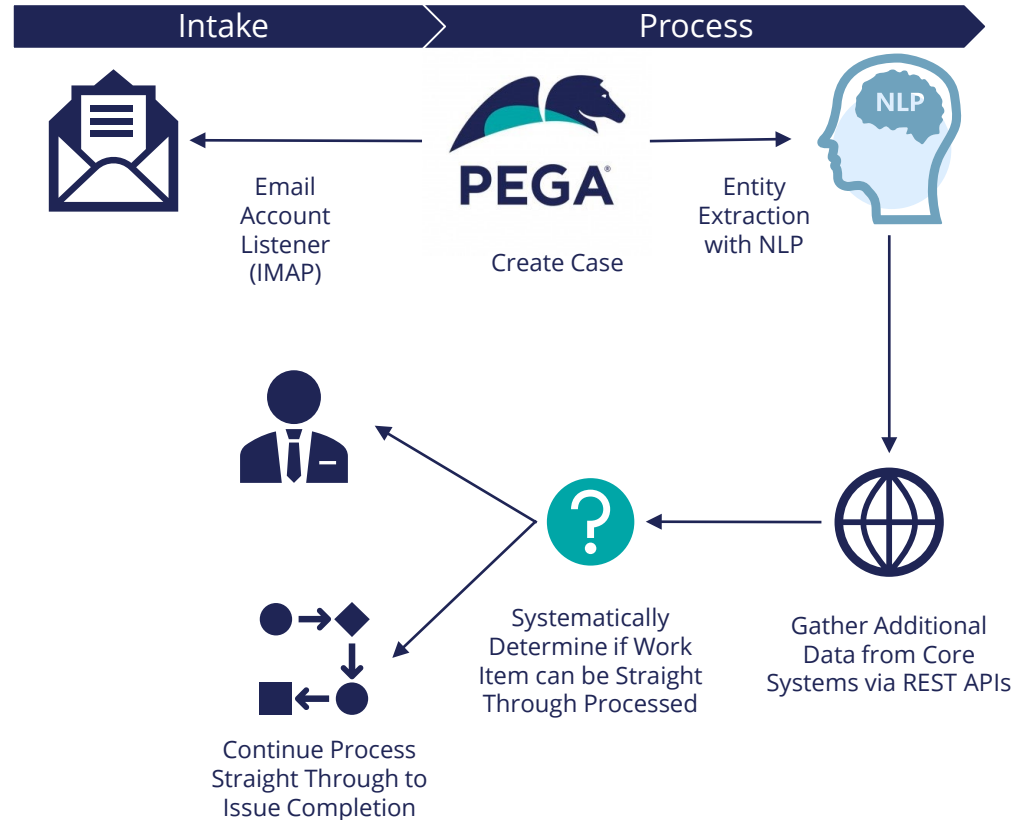
from manual tracking and email-based work management

to fully automated work tracking and systematic prioritization

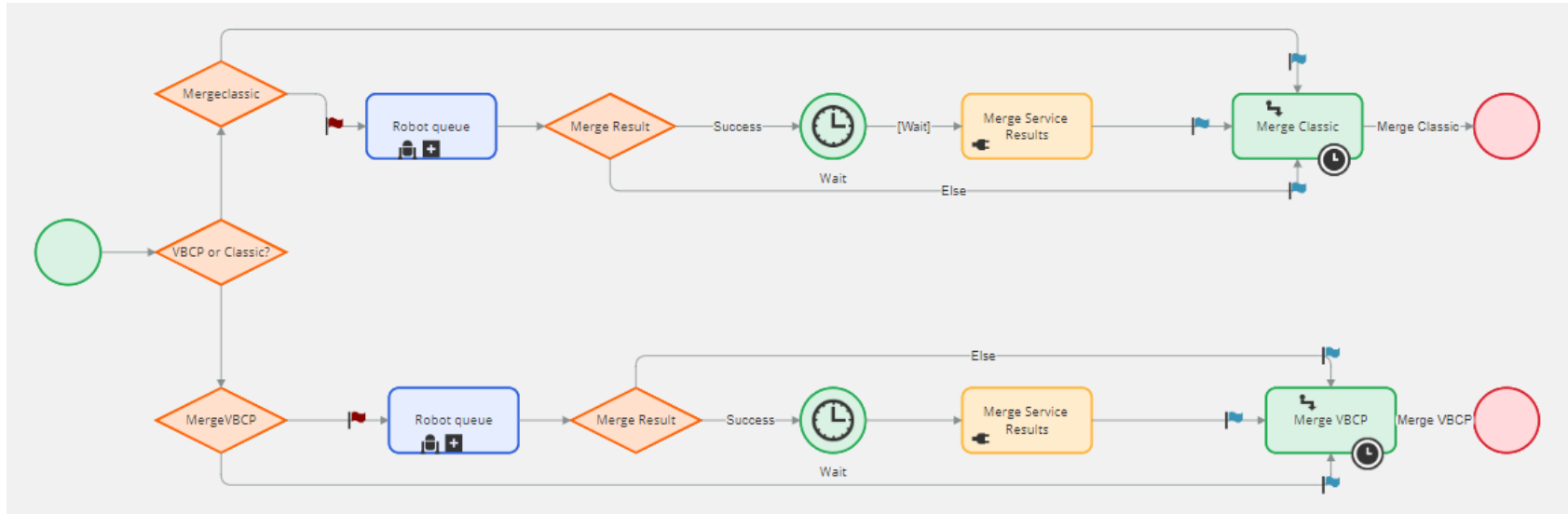
# Some Cool Components – Intelligent Email Assistant for Email Triage & Case Creation

**Business Problem:** Intake Channels will always require Email Intake Capabilities – so why not just create cases from the source & extract key data to support the system or operation?

**Result:** Automatic Case Creation, Straight Through Processing for majority of cases



# More Cool Stuff: Calling RPAs from the Platform Over Cloud to Augment Straight Through Processing



# But What About Stand Alone Process Automation? Isn't that supposed to be the savior?

**Robotic Process Automation** is not a **SOLUTION** or a **STRATEGY** – RPAs are a **COMPONENT** of a larger solution.

**You cannot automate bad processes and expect long term results.**

# What's Next for Unum's Digital Transformation?

- Tibco Replacement / Replatforming into Pega – 2019-2020
- Enhancement of Natural Language Email Intake into Back Office

ESPN



MLB MIN Doumit: 2-3, HR(5), 2 RBI Mauer: 2-3, HR(5), 2 RBI

ESPN



**PEGA<sup>®</sup>**

Build for Change<sup>®</sup>