**Archie – Role, Responsibilities & Presentation Script for EverSure BPM Project**

**🔹 Role in the Project:**

**Primary Role:** BPMN Model Development (Digital Process)  
**Secondary Role:** Presentation Development (Co-lead)  
**Collaborative Role:** Contributor to Redesign and Issue Register Sections

**🔹 Responsibilities Breakdown:**

**📌 Process Discovery – Digital BPMN Model**

* Led the modeling of the **digital insurance sales process** with Isha using BPMN 2.0 notation.
* Designed pools and lanes to represent marketing, sales, and back office workflows.
* Structured end-to-end flow using **start events**, **exclusive gateways**, and **automated decision points**.
* Emphasized the **automation and filtering steps** done by the algorithm to show efficiency and data-driven processes.

**📌 Presentation Development – Co-lead**

* Designed slides for process comparison, issue visualization, and redesign outcomes.
* Ensured clarity, balanced text-visual content, and prepared supporting visuals for BPMN models.
* Created smooth transitions between slides and ensured consistent narrative flow.

**📌 Redesign Contributor**

* Contributed insights into automation, especially around **lead qualification**, **system integration**, and **auto-generated contracts**.
* Linked each redesign to real-world consequences and measurable KPIs.

**🔹 Key Concepts Archie Should Understand**

**💡 Business Process Concepts**

* **BPMN Elements Used**: Events, Activities, Lanes, Message Flows, Gateways
* **Automation in BPM**: Where automation adds value and how it reduces manual effort and cycle time
* **Business Process Redesign (BPR)**:
  + Task Elimination
  + Parallelism
  + Empowerment
  + Standardization
  + Technology Enablement
* **Cycle Time Efficiency (CTE):**
  + Significance of CTE in identifying delays even in digital processes
  + Importance of minimizing non-response time

**💡 Contextual Awareness**

* EverSure’s digital process is faster but inefficient due to poor lead conversion and lack of personalization.
* Digital contracts are low-value (~€500), and only 10% of offers result in contracts.
* Archie’s insights help modernize this path while ensuring it complements traditional processes in a hybrid system.

**🎤 Archie's Full Presentation Script (First Person)**

**Slide 1 – Title Slide:** Hi everyone, I’m Archie. I led the BPMN modeling for EverSure’s digital process and co-developed the presentation you’re seeing today.

**Slide 2 – Project Overview:** Our project explores how EverSure can evolve by merging its traditional and digital insurance workflows. We mapped both as-is processes, analyzed their issues, and designed a streamlined to-be process.

**Slide 4 – Digital BPMN Model:** I modeled the digital process, which begins with the marketing team generating leads through ads and content like white papers. Then an algorithm filters leads. Sales quickly prepares standard offers for the filtered ones. Customer responses can vary: they might decline, accept, ask for a call, or not reply at all.

The process is automated and fast, but not always efficient. The biggest weakness is in lead quality—70% of leads never respond.

**Slide 5 – Cycle Time Efficiency:** Even though this process is digital, the CTE is just about 6.33%. That's due to long wait times for customer responses—up to 3 weeks. We realized that automation alone doesn’t always equal efficiency if leads aren’t nurtured properly.

**Slide 8 – Issue 3: Poor Lead Quality:** From my analysis, we found that 50% of leads are filtered right away, and of the rest, 70% go cold without responding. Only 10% convert into contracts. That’s a huge waste of time and marketing money. This is a classic case of automation without personalization.

**Slide 10 – Redesign Proposal 2: Hybrid Lead Qualification:** To fix that, we proposed a hybrid system. Instead of just relying on filters, we integrate traditional sales logic into the algorithm. Leads get scored based on potential value. High-value leads are assigned to reps; the rest go through the digital flow.

**Slide 11 – Redesign Proposal 3: Streamlined Reporting and Offers:** In the redesigned process, offers will be auto-suggested using templates, and reports generated instantly. This saves time and allows reps to personalize offers faster. It also keeps the customer experience smooth.

**Slide 13 – Expected Benefits:** By combining personalization with automation, we expect:

* A 20% improvement in good lead ratio
* Conversion rates to grow from 10% to 15%
* Non-response to drop below 50%
* And a more scalable, modern sales engine

**Slide 14 – Conclusion:** EverSure has an incredible opportunity here. By merging traditional depth with digital agility, and fixing what's broken on both ends, they can redefine how they sell insurance in the future.

**Slide 15 – Q&A:** Thanks! I’m happy to take any questions about the digital process, lead automation, or any BPMN modeling decisions we made.

✅ Would you like me to continue with **Isha** next?