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

**🔹 Role in the Project:**

**Primary Role:** BPMN Model Development (Digital Process)  
**Secondary Role:** Final Report Compilation (Co-lead)  
**Collaborative Role:** Redesign Contributor and Reviewer

**🔹 Responsibilities Breakdown:**

**📌 Process Discovery – Digital BPMN Model**

* Partnered with Archie to create the **BPMN 2.0-compliant model** of EverSure’s digital insurance process.
* Focused on ensuring accurate representation of **automated tasks**, **system integration**, and **customer interaction points**.
* Structured model to highlight decision points such as **lead filtering, email responses, and contact requests**.

**📌 Final Report Compilation – Co-lead**

* Co-managed the **assembly and formatting** of the final project report with Richa.
* Ensured **narrative consistency, visual alignment, and formatting quality** across all sections.
* Integrated BPMN diagrams, cycle time analysis, issues, and redesign strategies cohesively.

**📌 Redesign Contributor and Reviewer**

* Contributed to the design of automation-related enhancements.
* Ensured that proposed changes aligned with key BPM principles.
* Helped refine final redesign write-up for clarity and impact.

**🔹 Key Concepts Isha Should Understand**

**💡 Business Process Concepts**

* **BPMN Constructs:** Lanes, Tasks, Gateways, Events, Message Flows
* **System-Driven Workflow Modeling**: Modeling automation using BPMN best practices
* **Business Process Redesign (BPR):**
  + Standardization
  + Empowerment
  + Technology Enablement
  + Case Manager
  + Error Prevention
* **Cycle Time Efficiency (CTE):**
  + Shows how efficiently a process delivers value
  + Low CTE in digital (6.33%) is caused by customer non-response and unfiltered leads

**💡 Contextual Awareness**

* Digital processes at EverSure are **efficient in speed** but **inefficient in lead quality and system verification**.
* The role of BPMN is to visually communicate both system advantages and gaps.
* Final report reflects the team’s full understanding of **process logic and transformation goals**.

**🎤 Isha’s Full Presentation Script (First Person)**

**Slide 1 – Title Slide:** Hi everyone, I’m Isha. I worked on the BPMN model for EverSure’s digital process and co-led the compilation of the final project report.

**Slide 2 – Project Overview:** EverSure is merging two very different sales processes—traditional and digital—after acquiring a digital competitor. We were tasked with documenting, analyzing, and redesigning these processes into one unified model.

**Slide 4 – Digital BPMN Model:** Archie and I developed the BPMN model for the digital process. It begins with the marketing team generating leads. An algorithm filters out irrelevant leads and forwards valid ones to the sales team. Offers are prepared and sent digitally. Customers either respond, request contact, or ignore the email. Responses are processed automatically, and successful contracts are handled in INSU and AUIN systems.

**Slide 5 – Cycle Time Efficiency:** Despite automation, the CTE here is low—just over 6%. The bottleneck is the **three-week wait for customer responses**, and the system is burdened with **high error rates (15%)** during contract verification.

**Slide 8 – Issue 3: Poor Lead Quality:** While reviewing the issues, I noticed the digital process suffers from poor lead quality. Half of the leads are discarded instantly, and 70% of the remaining ones never respond. This makes the process seem efficient, but in reality, it wastes a lot of effort.

**Slide 10 – Redesign Proposal 2: Hybrid Lead Qualification:** Our redesign introduces a smarter lead scoring system. It blends traditional knowledge with automation, allowing high-value leads to get personal attention and others to continue in the automated flow. This keeps the balance between efficiency and effectiveness.

**Slide 11 – Redesign Proposal 3: Streamlined Offers & Verification:** I contributed to this redesign by proposing auto-generated contracts and system-driven verification. This eliminates repetitive work and reduces human error while accelerating delivery.

**Slide 13 – Expected Benefits:** These redesigns lead to:

* Better lead conversion (from 10% to 15%)
* Lower error rate (from 15% to 5%)
* Faster contract turnaround
* More scalable and sustainable digital operations

**Slide 14 – Conclusion:** My role helped ensure the digital process was modeled clearly and that our redesigns were reflected properly in the report. We believe our solutions bring balance to both high-tech automation and high-touch sales.

**Slide 15 – Q&A:** Thank you for your time! I’d be happy to answer questions about the digital BPMN modeling or how we structured our report to reflect these insights.

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