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

**🔹 Role in the Project:**

**Primary Role:** BPMN Model Development (Traditional Process)  
**Secondary Role:** Issue Register Development (Co-lead)  
**Collaborative Role:** Redesign Contributor

**🔹 Responsibilities Breakdown:**

**📌 Process Discovery – Traditional BPMN Model**

* Collaborated with Arnav to build a **detailed BPMN 2.0-compliant model** for EverSure’s traditional insurance process.
* Ensured clear demarcation of **pools** (EverSure and Customer), **lanes** (Sales Representative, Sales Admin, Back Office), and all **sequence flows**, **gateways**, and **message flows**.
* Applied BPMN modeling guidelines to ensure **readability and stakeholder alignment**.

**📌 Issue Register – Co-author**

* Identified inefficiencies in system integration and waiting times in traditional process.
* Documented **evidence, impact, and assumptions** for each issue.

**📌 Redesign Contributor**

* Supported formulation of solutions addressing waiting time reduction, system integration, and report automation.
* Mapped BPR principles like **Technology Enablement**, **Standardization**, and **Case Manager** into redesign solutions.

**🔹 Key Concepts Vibhu Should Understand**

**💡 Business Process Concepts**

* **BPMN 2.0 Elements:** Pools, Lanes, Tasks, Events, Gateways, Sequence Flows
* **As-Is vs To-Be Process Models**
* **Business Process Redesign (BPR) Principles:**
  + Technology Enablement
  + Triage
  + Task Elimination
  + Standardization
  + Case Manager
* **Cycle Time Efficiency (CTE):**
  + Formula: CTE = Processing Time / (Processing + Waiting Time)
  + Importance: Indicates how efficiently value is being delivered

**💡 Contextual Awareness**

* EverSure's traditional process is **manual and relationship-heavy**, with long delays and higher-value contracts.
* The digital process is **automated and fast-paced** but suffers from poor lead quality.
* Project goal: **Merge both into a lean, integrated workflow** that improves efficiency, cost, and customer experience.

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

**Slide 1 – Title Slide:** Hello everyone, I’m Vibhu, and I’ll walk you through our team’s project on merging processes at EverSure as part of our Business Process Management course.

**Slide 2 – Project Overview:** EverSure has been serving businesses for over 20 years. Their strength lies in deep customer relationships. However, with digital competitors emerging, they acquired one such company, and now face the challenge of merging traditional and digital insurance sales processes. Our task was to analyze both, model them, and propose a better, unified system.

**Slide 3 – Traditional BPMN Model:** I worked on modeling the traditional process using BPMN 2.0. It begins with the sales rep identifying a potential client, sending it to the sales admin for a report, then booking a meeting, followed by offer preparation, customer feedback, and contract registration. What stands out is how much **waiting time** there is, especially in the reporting and meeting scheduling stages. These delays stretch the cycle time and limit the number of clients served monthly.

**Slide 5 – Cycle Time Efficiency:** From our analysis, the traditional process has a CTE of just 8.86%, meaning only 8.86% of the total cycle time is productive work. The rest is just waiting. This inefficiency holds the company back despite the high-value contracts.

**Slide 6 – Issue 1: Disconnected Systems:** While working on the issue register, I identified that EverSure uses CNTR and OPER for traditional, and INSU and AUIN for digital. This disconnect means redundant work, missed data, and higher error rates in the digital flow. It also blocks cross-selling opportunities.

**Slide 7 – Issue 2: Long Waits:** We found traditional processes suffered the most from long waiting times. Customer reports take a week to be prepared, and meetings take two weeks to happen after that. For a client, this could mean weeks of no updates.

**Slide 9 – Redesign Proposal 1: Unified System:** My key redesign input was about integrating the systems. With one platform, there’s no duplication, errors drop, and data becomes accessible across departments. It also allows automation and faster execution.

**Slide 11 – Redesign Proposal 3: Report Automation:** Instead of sales admins manually preparing reports, the new system will auto-generate them based on templates and existing data. This alone can cut days of delay, allowing us to reach 20% more customers.

**Slide 13 – Expected Benefits:** With these changes, EverSure can boost CTE from under 10% to 15%, cut IT costs by €20,000 annually, and even improve digital lead conversions by 20%. Customers will also experience faster service and fewer errors.

**Slide 14 – Conclusion:** To conclude, merging both approaches is about leveraging the depth of traditional sales with the speed of digital operations. With our redesign, EverSure is set to modernize operations without losing what made them successful.

**Slide 15 – Q&A:** Thank you. I’m happy to answer any questions about the traditional process, system integration, or our redesign logic.