

TO-BE Evaluation 2 — Expanded COPAFILT Analysis

This COPAFILT analysis evaluates the feasibility and organisational impact of implementing the future-state solution:

full automation of the Indexing & Routing process using IDAS, RPA, and automated customer communication.

C — Customer:

- Customers receive faster responses (hours instead of days).
- Mistakes drop significantly due to machine-driven classification.
- Automated confirmation ensures consistent communication.
- Overall satisfaction increases because service becomes predictable and timely.

O — Organisation:

- Restructuring of workload: simple tasks disappear, complex tasks remain.
- Teams affected by automation require redeployment.
- Governance must include RPA monitoring, AI drift control, and incident management.
- Aligns with Allianz's productivity program goals and organisational strategy.

P — People:

- Roles shift from repetitive work to exception handling and quality control.
- Employees must be trained in new workflows and digital tools.
- UAT and process validation require strong involvement.
- Risk: resistance from employees used to routine tasks.
- Mitigation: early communication, training, and phased rollout.

A — Administrative Processes:

- SOPs must be updated for:
 - IDAS classification logic
 - RPA execution steps
 - Escalation paths when automation fails
 - Error logging and monitoring
- Exception management becomes more structured.

F — Finance:

Costs:

- Investment in IDAS development, RPA building, data integration, and licensing.
- Training and change management.
- Initial project management and testing efforts.

Benefits:

- Reduced FTE dependency for repetitive tasks.
- Ability to absorb seasonal peaks without extra hiring.
- Lower error costs due to improved accuracy.
- Long-term ROI expected to outperform manual operations.

I — Information:

- Stable and accurate data flow required between Outlook, task systems, and policy systems.
- Reporting dashboards must track:
 - RPA success rate

- Indexing accuracy
- Average handling time
- Volume distribution
- Continuous improvement cycles needed for AI classification models.

L — Legal:

- GDPR requirements for automated processing.
- Model transparency and explainability must be documented.
- SLAs may be redefined due to faster handling times.
- Contracts for cloud-based components must be evaluated.

T — Technology:

- Complex integration effort required for IDAS + RPA.
- RPA is sensitive to UI changes and requires maintenance.
- AI model drift must be tracked and retrained when needed.
- Strong monitoring and fallback mechanisms required.

Conclusion:

The COPAFILT evaluation shows that full automation is feasible and brings high value.

Main risks involve change management, data integration, and legal compliance.

With proper governance and stakeholder involvement, the solution is highly recommended.