



Cleva Process factory

Business document

Cleva Process factory offers powerful, user-friendly capabilities for supporting the business process, regardless of the distribution channel or insurance product.

Cleva

Streamline the entire life cycle of business process management

Cleva Process factory crushes business complexity, by providing the tools needed to quickly implement a process adapted and customised to the company, and so, to help sales transform market opportunities into a profitable business and to help reduce operational risk.

Business process

Workflow-based

Underwriting process

Claim file

Business rules

Dashboard

Forms

SLA

API

BPMN/CMMN

Key points

- **Improved productivity** – Cleva Process factory offers an innovative user experience that makes case flow **easier, faster and more efficient**.
- **Flexibility & configurability** for processes and business rules changes.
- Revenue growth – Cleva Process factory helps to **streamline and automate processes** to **reduce costs**.
- Process configuration accelerators – **~50% time saving** when compared to creating processes from scratch.
- Effective workforce management, with process performance being measured using SLA – **better control and efficiency in the response to clients**.

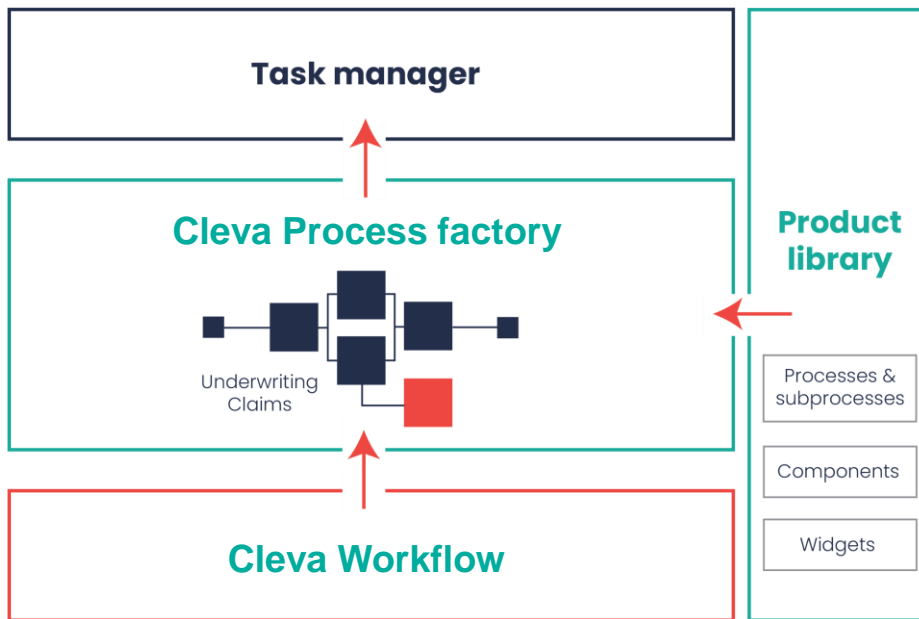


End-to-end process management

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Cleva Process factory streamlines the entire life cycle of process management, as it allows to automate the end-to-end business process, including underwriting, claims or other processes.

End-to-end process management, using the workflow framework, with features to manage a higher level of process complexity and better ways to measure process efficiency.



End-to-end process management

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Unified environment: Cleva Process factory's components work together in a seamless fashion, facilitating efficient and accurate case processing.

Manage new business: LOB-oriented process, composed of a flow, service connections, screens and configuration points.

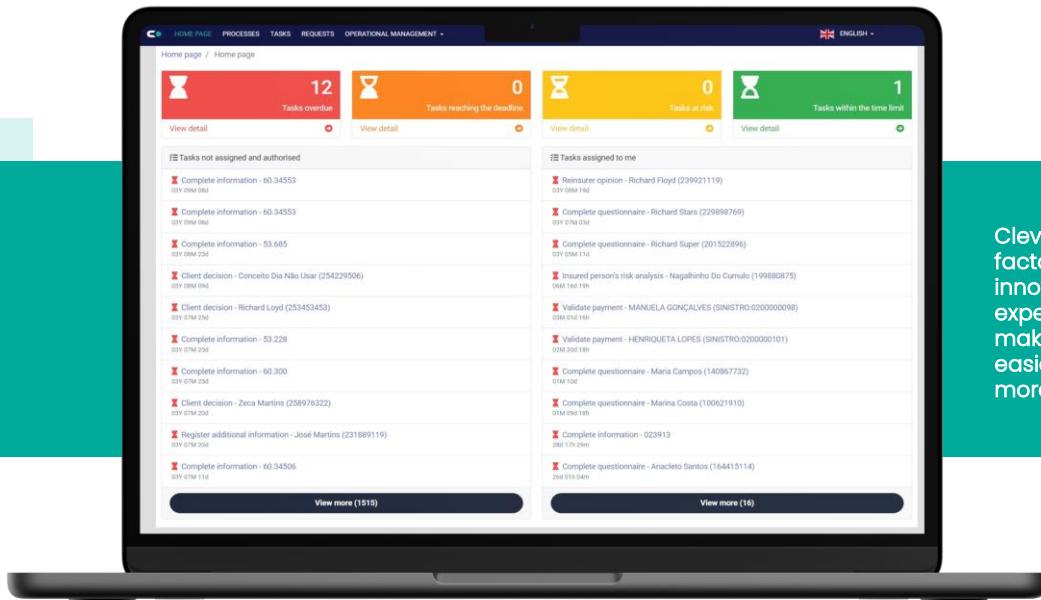
Build custom underwriting workflow processes: Cleva Process factory offers pre-defined components to be used, covering the complete policy life cycle: proposals/new business and endorsements.

Build custom claim workflow processes: Cleva Process factory offers pre-defined components to be used, covering the complete claim life cycle: notification, eligibility, assessment, claims and Indemnity payment.

Operational dashboard: Information to monitor process efficiency, identifying bottlenecks and providing a 360° view of process operation.

Innovative user experience

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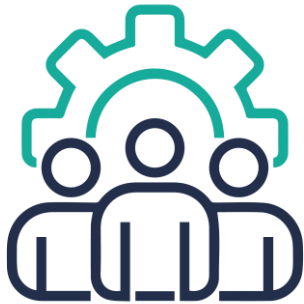
Cleva Process factory offers an innovative user experience that makes case flow easier, faster and more efficient.

Operational management dashboards: Improve productivity with operational management dashboards that provide real-time information needed for decision-making. For the Tasks dashboard, critical updates and task assignments are provided in real-time, allowing case managers to work on multiple cases simultaneously. The SLA dashboard displays the performance for each process type and its tasks based on the SLA information, allowing managers to identify bottlenecks and improvement points in the execution of processes.

Simplification and automation: Cleva Process factory empowers users and managers to be more efficient in handling multiple cases while giving the required attention to complex cases.

Collaborative workflows

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Cleva Process factory provides a collaborative environment where insurers can build relationships with all parties in the process, for reduced turnaround times and improved responsiveness.

Web-based collaborative workflow: Every entity has visibility at every step of the process, so everyone knows exactly who is responsible for the next move, eliminating the need for back-and-forth communications.

Task manager: A task manager application provides task management functionality.

Task operations: Assignment and reassignment of tasks, individually or in bulk, with the possibility of adding comments.

Access control: Possibility of defining permissions by group and by hierarchy and of having different levels of access using privileges or roles.

Dashboards: For the Tasks dashboard, critical updates and task assignments are provided via a real-time dashboard, and processes and case managers can work on multiple cases simultaneously. The SLA dashboard displays the performance for each process type and its tasks based on the SLA information, allowing managers to identify bottlenecks and to improve points in the execution of processes.

Service level agreements: Implement SLA to maintain and strengthen client relationships. Possibility of configuring task SLA with four levels – tasks at risk, overdue tasks, tasks reaching deadline and tasks within the time limit – associated with actions like alerts and notifications.

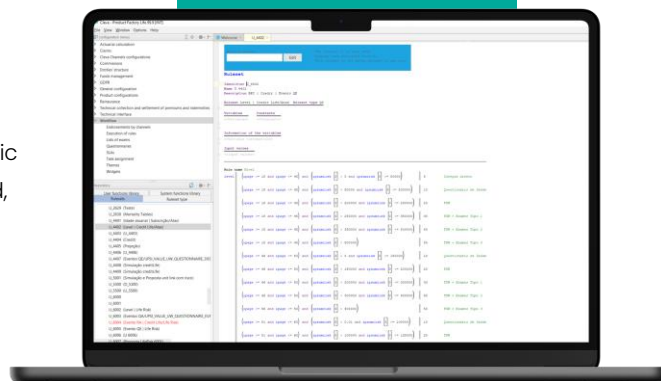
Sharing and automation: Speed up decision-making and automate the process to request missing information.

Collaborative workflows: Cleva Process factory facilitates integration with external entities, such as providers and others.

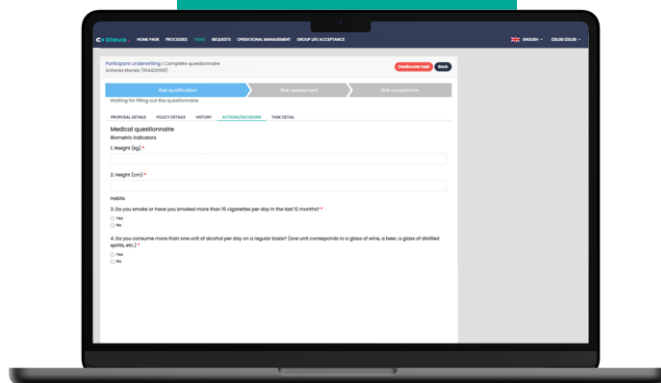
Highly configurable

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Cleva Process factory is flexible and highly configurable and can be customised to fit specific guidelines and business processes. Its integrated, user-configurable rules engine and workflow increase users' flexibility.



Forms, such as medical questionnaires, are available, fully configurable, serving as input for business rules and decision making.



Highly configurable




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Speed to market: It enables to deploy new rules immediately and quickly roll out new products, without requiring programming changes.

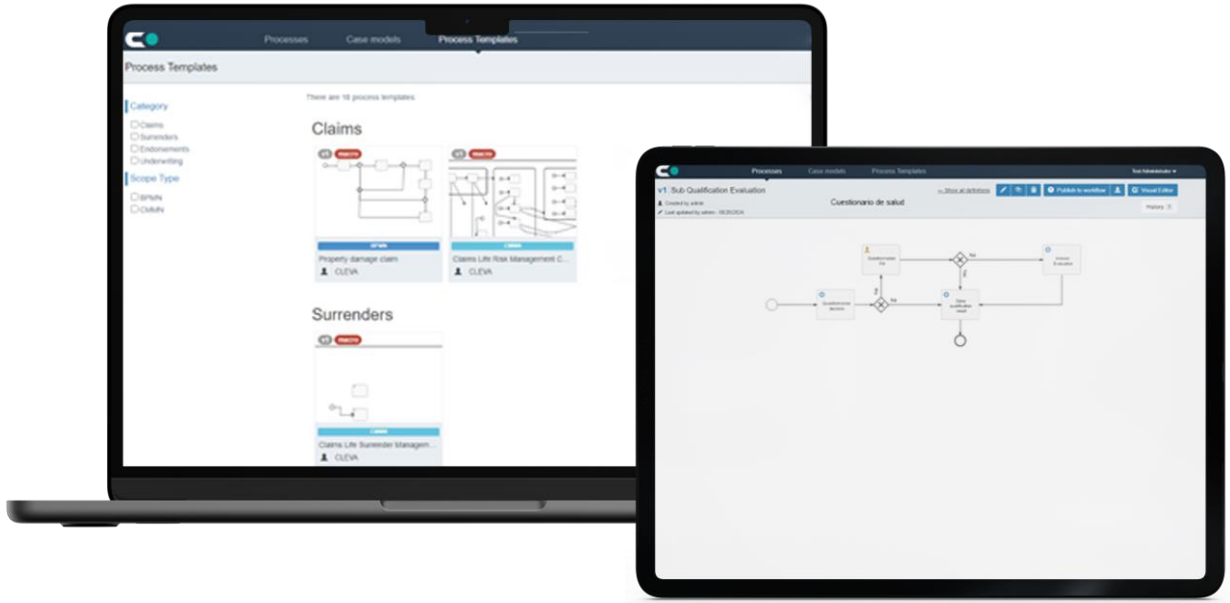
Incremental configuration: Cleva Process factory's rules engine can be configured incrementally, as new repeatable decision scenarios are identified, with no coding required.

Code-free configuration: Code-free, user-configurable rules engine to support custom permissions, workflows and authority levels. Configuration is done using IBML (Insurance Business Modelling Language). The IBML allows configuring rules that condition task behaviour, such as the data required in questionnaires. The process flows can be completely automated by using business rules that fit the insurer definition and the product parameterisation.



Business modelling

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Cleva Process factory provides a modeller tool for modelling processes, based on two standard notations: BPMN (Business Process Modelling Notation) for sequential processes and CMMN (Case Management Modelling Notation) for casuistic processes .


The configurator creates a process reusing process templates, components and widgets available in the product library and pre-integrated into the Cleva solution.

The process can be customised and integration tasks can be defined to integrate with external systems, via API.

Business modelling



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Process modelling: The definition of processes allows defining default configurations while providing insurers with increased flexibility and autonomy.

Design modeller: The designer allows managing a higher level of process complexity and specificity.

CMMN & BPMN support: The workflow engine supports global standards for process modelling, that allow automating insurers' most complex business processes using an easy-to-adopt visual modelling language.

Pre-built component: The product library provides processes and components, pre-integrated, reusable, tested, and modular to accelerate the entire modelling process and delivery. Possibility of configuring widgets' location, to enable or disable widgets, to add specific widgets and to customise labels' names.

Integration capabilities with API: Allows easy integration with the entire ecosystem of the insurance company.





Cleva Process factory provides a solution that allows clients to build their business processes (underwriting, claims or other processes) by offering predefined components and widgets to be used.

Product Management

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