



Process standardization drives efficiency and productivity.

ClearView teams across multiple locations use Nintex Promapp® to keep everyone on the same page, providing access to processes anywhere, anytime.

Organization

ClearView

Website

www.clearview.com.au

Industry

Financial services

Country

Australia

About

ClearView is an ASX-listed company which manages more than \$6.9 billion in funds and \$148 million in life insurance policies. ClearView has provided financial services to Australians since 1976.

Business Benefits

Simplified process and procedure documentation

Helped drive continuous improvement mindset within ClearView

Process information accessed anywhere, on any device

Easier to manage complaints, incidents and claims notifications workflow

Visual representation of how the organization operates

ClearView's range includes investment, superannuation and retirement alternatives as well as life insurance cover, with their network of branches extending across New South Wales, Queensland, Victoria and Western Australia.

ClearView's senior management team realized some existing processes had become unclear, leading to inefficiencies and reduced productivity.

'We had in place a large number of process documents and training materials that had not been reviewed for a long time,' says Matthew Ream, Business Process Analyst at ClearView. 'As ClearView grew, some of our processes had changed however those changes were not accurately reflected in the supporting documents in the context of the larger organization.'

Ream says the situation was exacerbated by the fact that the company had a mix of long-term staff and more recent arrivals. Some were very used to existing processes while others brought with them different approaches to tasks.

'We knew we had some inconsistencies in place and needed to find a way to overcome this and provide a standard approach to both our process management.'

— **Matthew Ream**, Business Process Analyst, ClearView

People driving change management.

A decision was made to go to market to find a better way of managing the firm's business processes.

After reviewing a range of options, the decision was made to implement Nintex Promapp. Planning and implementation was completed within five months.

'We started with workshops and training sessions to help drive staff engagement with Nintex Promapp's methods,' says Ream. 'We identified process experts in each team and adopted a 'buddy' approach so the process experts could test what they had documented on other staff members to ensure everything worked properly.'

One of the biggest initial benefits gained following the Nintex Promapp deployment was the company's ability to simplify its process for documenting procedures.

Nintex Promapp has also helped to drive a continuous improvement mindset within the company. Ream says the software provides a 'living tool' that visually represents how the organization operates.

'Being a cloud-based system means it can be accessed anywhere and on any device. This is a big advantage when you have staff working across multiple locations.'

— **Matthew Ream**, Business Process Analyst, ClearView

Do simply.

Ream says another benefit has come from the way in which Nintex Promapp is structured around an 80/20 approach. Most processes are standard and occur 80 percent of the time, while the remaining 20 percent can be captured through 'what-if' scenarios, which helps to keep day-to-day operations on track.

'Internally we call it the 'do simply' approach,' he says. 'We wanted a system that was easy to use, easy to understand, and easy to manage. Nintex Promapp ticks all those boxes.'

He says Nintex Promapp has also helped ClearView create a series of forms that help manage workflow in key areas such as complaints, incidents and claims notifications. Each can be directly linked back to the processes so that any changes that might be required can be readily identified.

Ream says the company is now focused on implementing a continuous improvement program, using Nintex Promapp to improve focus on quality and reporting.

'Nintex Promapp ensures that owners of processes are alerted when any changes are made, thus ensuring quality and consistency at all times,' he says. 'It has proven to be a very valuable tool for our company.'



About Nintex

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting www.nintex.com and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

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