Spreadsheet-Free Modernization: Simplifying 'Rate Sheets' Management with Joget | Allied Benefit Systems, United States

CASE STUDY

mokxa

Key Takeaways

Break free from spreadsheets in 6 weeks	75% productivity boost, 10x faster Rate Sheets creation since live	Instant access to Exec Dashboards to view, approve & download Rate Sheets	50% less work for data entries, finance calculations & data analysis	100% Rate Sheets transparency. Secured with version controls, role-based access & audit trails

Client Summary

ALLIED

Allied Benefit Systems is a national healthcare solutions company. Founded in 1980, they have grown to be the largest, independent third-party insurance administrator in the United States.

They customize self-insurance benefit solutions for their customers (typically small to medium size organizations). These solutions are designed to align their customers' organizational needs and insurance plans that best support their employees' needs.

'Rate Sheets' management is a workflow at Allied Benefit Systems - to generate detailed financial sheets for the distribution of funds to healthcare sub-entities (like premiums, broker commissions, admin fees, etc.) servicing their customers.

This requires extensive use of spreadsheets (MS Excel) for various administrative & analytical tasks. These include data entry, performing calculations with formulas, conducting data analytics, and more.

Solution

Using Joget, Mokxa collaborated with Allied Benefit Systems to deliver the solution in 6 weeks with optimal resources utilization. Breaking free from 'Excel-intensive' workflows, the solution enabled them to accelerate 'Rate Sheets' creations and simplify premiums distribution analysis. 'Rate Sheets' management was made user-friendly, seamless & modernized end-to-end.

Challenges

The 'Rate Sheets' management workflows used to be heavily reliant on spreadsheets, emails, and phone calls. Despite maximizing the capabilities of these technologies, Allied Benefit Systems still faced significant limitations inherent to manual processes.

- Inefficient data management. Business users needed to manually transfer information from meetings, phone calls & emails into spreadsheets.

- Cumbersome administration for data entries, calculations, sending reports & reminders, etc.

- Inevitable human errors due to high volume of manual works.

- Ineffective Service Level Agreements (SLAs) and deadline tracking.

- Non-existent version controls and change management logs leading to inaccuracies and process breakdown.

- Lack of data-based analytics and decision support due to a high level of effort involved in producing such analytics.

Capabilities

☑ Leveraging agile methodology, Mokxa collaborated with citizen developers from Allied Benefit Systems to build the solution on low-code Joget.

☑ In 6 weeks, we delivered the solution that covers the financial and analytical aspects for premiums distributions to various entities. User friendly dashboards helped Allied's Benefit Systems executives to easily access data that are meaningful to them - for effective analysis and decision-making.

☑ Instant access to pending action items enabled key stakeholders to view, approve, and download 'Rate Sheets' on-the-fly. The solution also helped them to seamlessly track, monitor, and analyze the performance of their financial distribution strategies.

☑ Automated processes free up the team to focus on creative tasks. Templatized forms and customizable reports reduced time for data entries by 50%. A reduced likelihood of human errors allowed Allied Benefit Systems to scale with lesser risks and fewer variables.

☑ Complex financial formulas and policies are baked into the design so users do not require extra steps to ensure compliance and data integrity. This helped Allied Benefit Systems to create rate sheets 10x faster.

☑ Enabled effective, secured cross-department collaboration via version controls, role-based access, and change management with audit trails. These are easily configured based on changing needs of Allied Benefit Systems.

☑ Optimized the review and approval process between business users and executives. Plus, actions are time-stamped for future audits.

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