



Case Study – Claims Consultancy

Claims Consultancy Insight – Strategic Review – One Day Workshop

A clear definition of what a company wants to achieve is necessary, but not sufficient. To understand how to get there, and to deliver what is needed to make that happen is challenging and where the hard yards have to be made.

SX3 have seen time and time again the value clients gain from the input of the external expert, testing assumptions.

For example, a large claims management organisation was restructuring their operation to

1. incorporate anticipated changes to their market
2. position themselves for growth

They were confident that the strategic decisions made were the right ones; but wanted to check that the activities they were undertaking would achieve their objectives as planned.

Bring an Outside Perspective

SX3 were approached to bring an outside perspective on to their project work which was using internal resources in the main. Furthermore, a quick turnaround was required since the project work was already in progress.

An approach was agreed with the client which centred on a promptly arranged 1-day workshop at the client's premises in order to:

- walk through the new and developing processes and systems,
- provide challenge, input ideas and give feedback utilising experience of other operating models and claims handling philosophies
- review developments by other members of the client's peer group, and innovations in the claims market generally, that may impact the project

The scale and breadth of the SX3 network of consultants meant the team brought together for the workshop had a variety of career backgrounds, including operational transformation, technical claims handling, and claims market insight – all with 20 years' + experience of the claims market. This ensured that all aspects of the project work could be addressed during the workshop itself.

The workshop was set up to be highly interactive, looking at the rationale of the strategic objectives, project structure and personnel, assumptions made, progress on each workstream, and concerns / challenges identified by the project team.

The SX3 team provided input to the project team during the course of the workshop and were able to provide them with ideas and insight to drive their progress.

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Following the workshop, SX3 provided both a verbal debrief to the project sponsor and a full written report on the key points and issues arising from the workshop, along with recommendations to the project team.

It turned out that the project had proceeded with some flawed assumptions and had missed one fundamental that had to be addressed before the strategic ambition could be achieved. Naturally, the client immediately took action to address the issues highlighted by the workshop.

A near miss? We think so, the client was at risk of investing significant time and cost on a project that would have failed to meet expectations. Their decision to take time out and to involve industry experts allowed them to make that proverbial “stich in time”.

[SX3 Case Studies](#) – are published to help prospective clients understand how value opportunities for the use of our services may be found and to give an insight as to how SX3 works with clients. All projects are unique and have more detail than can be expressed here.