

SUBMISSION INFORMATION

Required: (primary contact; must be employee of submitting insurer)

Insurer Name:

First Name

Last Name:

Job Title:

Email Address:

Phone Number:

Optional: (if this case is being submitted in collaboration with a solution provider partner, you may include a secondary contact at that company)

First Name:

Last Name:

Solution Provider Company Name:

Job Title:

Email Address:

Phone Number:

Submission Category

- Core (including policy, billing, claims, rating, and other key software and systems)
- Data (including analytics, reporting, AI, LLMs, machine learning, etc.)
- Digital (including portals, mobile, omni-channel, RPA, workflows, etc.)
- IT Practices (including methodology adoption, centers of excellence, etc.)

Please note that Datos Insights may reclassify submissions to areas of best fit. By submitting, insurers acknowledge that the purpose of this form is to collect information for publication.

PRODUCT INFORMATION

1. Business Need

- a. Why was this project executed? What was the underlying business driver?
- b. What had the organization tried before to address this problem that didn't work?
- c. Include 2-3 specific metrics showing the problem's impact

2. Sponsor

Who in the organization was the project sponsor and what was their goal?

3. Team

Who executed this project? How many people? What roles? Internal or external? If external, who was the partner?

4. Approach

- a. Briefly describe the phases of this project, the time associated with each phase, and important dependencies, where applicable.
- b. What made this approach different from standard industry practice?

5. Challenges and Success Factors

- a. What challenges were encountered and how were they overcome?
- b. What factors were critical to the success of this project? What practices or processes led to the team's success?

6. Impact

What was the business impact of this project? How did the company benefit from it? Please provide any quantitative or qualitative metrics available (e.g., KPIs, transaction volumes, hours saved). Please note that quantitative metrics tend to be most effective in communicating impact.

If possible, please frame your impacts in terms of the Three Levers of Value:

- Did this project enable the company to sell more/grow (i.e., enabling a new product, a new or better way to sell, or a new market)?
- Did it enable the company to manage risk better (i.e. improving underwriting or claims results, relieving legacy technical debt)?
- Did it enable the company to cost less to operate (i.e. improving productivity, saving time, eliminating forms, or reducing overall costs)?

7. Lessons Learned

- a. What did the organization try that turned out to be great?
- b. What would the organization do differently next time?

Optional: What technologies and/or vendor products did this project rely on?

Optional: If you would like to include a visual for your project, please attach it with your submission.