



# KPMG strategy and roadmap help guide health services company's intelligent automation journey

**Methodologies build capabilities to assess automation opportunities internally**



**Client**  
Global health services company

**Sector**  
Insurance

**Project**  
Artificial intelligence strategy and center of excellence assistance

## The client

- This health services company has millions of customer relationships and thousands of employees around the world.
- The company strives to help those it serves feel protected and improve their health.

## Benefits to client

- Our coaching and training in assessing functions for intelligent automation viability have helped the organization be self-sufficient.
- Significant cost-saving opportunities identified across five functional areas.
- The synergies identified across the organization and new automation allows the company's leaders to explore new business models and improve overall employee experience with more opportunities to use analytical skills.

## Solution highlights

- The KPMG team assisted this health services company develop a robotic-to-cognitive intelligent automation strategy, an operating model, and a governance structure to sustain and manage its intelligent automation program.
- The team identified a significant number of automation opportunities that could lower costs and improve functional excellence and employee experience. This included an implementation roadmap for delivering the prioritized automation opportunities and a center of excellence team to manage the process.
- The team used a design thinking-based change management approach to drive behavioral change and instill an automation-first approach.

## Client challenge

- U.S. health services companies face challenging earnings, regulatory, and competitive pressures with smaller rebates and reimbursements and mergers taking place industry-wide combining insurance companies with retailers and pharmacy benefit managers.
- The company's future mergers offer challenges and synergy opportunities based on each company's current business model that can help the company remain competitive.
- Executives saw the opportunities intelligent automation offered for more efficient and better customer service in call centers and other areas as well as possible synergies to combine processes after future mergers. They wanted help building these capabilities in house.



## The solution

We provided a solution for assessing the health services company's operations and guiding the company's intelligent automation strategy.

- The KPMG team kicked off the engagement with an intense, two-day operational model assessment session in one of our Ignition Centers. While there, we defined how the organization should look in the future, built a business case to use in assessing multiple functions across the enterprise for robotic process automation (RPA), and developed a roadmap to guide the intelligent automation journey.
- We also identified opportunities for combining RPA with machine learning and artificial intelligence for higher impact.
- We used KPMG Cognitive Automation Patterns™ as a framework to help the client's executives identify business areas where artificial intelligence and cognitive technologies can automate or augment work and designed new knowledge work patterns.
- The team applied the collective KPMG firm knowledge and methodologies to help executives develop a vision, strategy, and implementation roadmap for the company's longer-term operating and governance model.
- The solution included a design thinking-based change management approach that can drive communication across the organization. The approach can also instill behavioral change across teams as the company looks to build an automation-first culture.



## The insights

The KPMG team worked with the client's team as independent advisers without solution or technology bias.

- We combined our deep intelligent automation (RPA through cognitive) and healthcare knowledge and experience to develop this health services company's intelligent automation strategy that provided the company with a sustainable, practical roadmap.
- Our long-time relationship with the client provided a foundation for trust.
- The KPMG team listened to the client's needs and responded with assessment tools, templates, and guidelines that enable its team to assess additional functions independently, allowing them to seek assistance only when needed.

---

**If you are interested in learning more about this case study, or if you are experiencing similar issues, please contact us.**

**Anand Sekhar**  
anandsekhar@kpmg.com  
312-203-5493

For more information about KPMG's intelligent automation capabilities, go to: [kpmg.com/us/intelligentautomation](https://kpmg.com/us/intelligentautomation)

[kpmg.com/socialmedia](https://kpmg.com/socialmedia)



**Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.**

The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act upon such information without appropriate professional advice after a thorough examination of the particular situation.

© 2019 KPMG LLP, a Delaware limited liability partnership and the U.S. member firm of the KPMG network of independent member firms affiliated with KPMG International Cooperative ("KPMG International"), a Swiss entity. All rights reserved.

The KPMG name and logo are registered trademarks or trademarks of KPMG International.