

CASE STUDY

100x Improvement to Claims Document Processing for Eastern Alliance

100X

Improvement on claims mail
turnaround time

87%

of documents processed
straight-through

60%

reduction in items
manually reviewed by
indexers



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Contact us at sales@roots.ai

Request a Demo

THE SITUATION

Our customer, Eastern Alliance ("Eastern"), a commercial carrier based in the US, specializing in Workers Compensation, identified a strategic need to modernize operations using various technologies, including AI. Claims document processing was a critical use case, so it was selected as the first area to deploy an AI Agent digital coworker.

THE CHALLENGE

Streamlining Claims Processing with Roots Automation: Overcoming Manual Document Handling Challenges

Eastern's claims department was dealing with a heavy volume of highly variable (unstructured) incoming documents that needed to be analyzed, indexed and routed to the correct recipient in a timely manner to support Eastern's claim-handling processes.

Its mailroom team, the first team to interact with these documents, was handling all documents manually, placing pressure on the team's capacity and impacting claims handling efficiency:

Eastern had tried alternative technologies and vendors but was not achieving its desired results. They often exceeded their document turnaround, taking five days (instead of three). And so, Eastern turned to Roots to support their program.



"We had an SLA and a turnaround time of three business days to do our claims mail. We worked hard to stay at three ... but it was tough."

Jen Zimmerman

Manager, Business Systems, Eastern Alliance

THE SOLUTION

Working together, Eastern and Roots teams evaluated use cases across the claims organization and identified document intake and indexing as a priority area.

Through a series of highly interactive workshops, Eastern and Roots teams:



Reviewed documents needed to be indexed.



Created a taxonomy of document types and outlined the data points needed to identify each document accurately.



Unpacked the capabilities of a **AI Agent** with the team and defined a new to-be process.



Built and implemented the solution alongside the team, ensuring adoption was high – which included naming the new AI Agent.



Eastern welcomed their **new AI Agent** and now digital coworker – “Phyllis” – with a Pizza Party.



Critically, Phyllis leverages Root’s proprietary Generative AI solution (InsurGPT™) to **accurately and efficiently receive, analyze, process and index** priority five mail (the highest-volume mail) within 1 hour (down from 5 days).

"A 100x improvement in processing speed."

"We began working with Roots in 2022 as part of a broader strategy to use technology for efficiency and better customer service. Focused on insurance, they spoke our language, understood our challenges, and helped us move fast. Deploying the first Digital Coworker at Eastern was rewarding. I'm proud we solved the core use case and implemented AI at Eastern Alliance."



Harry Talbert
Senior Vice President of Information
Systems Eastern Alliance



Phyllis, Eastern's Generative AI-powered AI Agent, significantly **improved processing speed**, saving more than 2,700 total human hours since Q1 2023!



Phyllis also **enhanced accuracy** by minimizing the likelihood of human error, ensuring that documents were correctly indexed and easily retrievable.



Additionally, the **mailroom team's productivity and capacity were substantially boosted**. With Phyllis handling the bulk of the document indexing tasks, Eastern's claims team was freed to focus on more strategic/higher-value activities without leaving team members overworked or stressed.



The overall **efficiency of the document indexing workflow was greatly improved**, enabling the Customer to streamline operations and focus on improvements to other business areas.



By integrating Phyllis into its operations, Eastern significantly **enhanced the speed and accuracy of document processing**, ultimately transforming its claims management and mailroom functions.

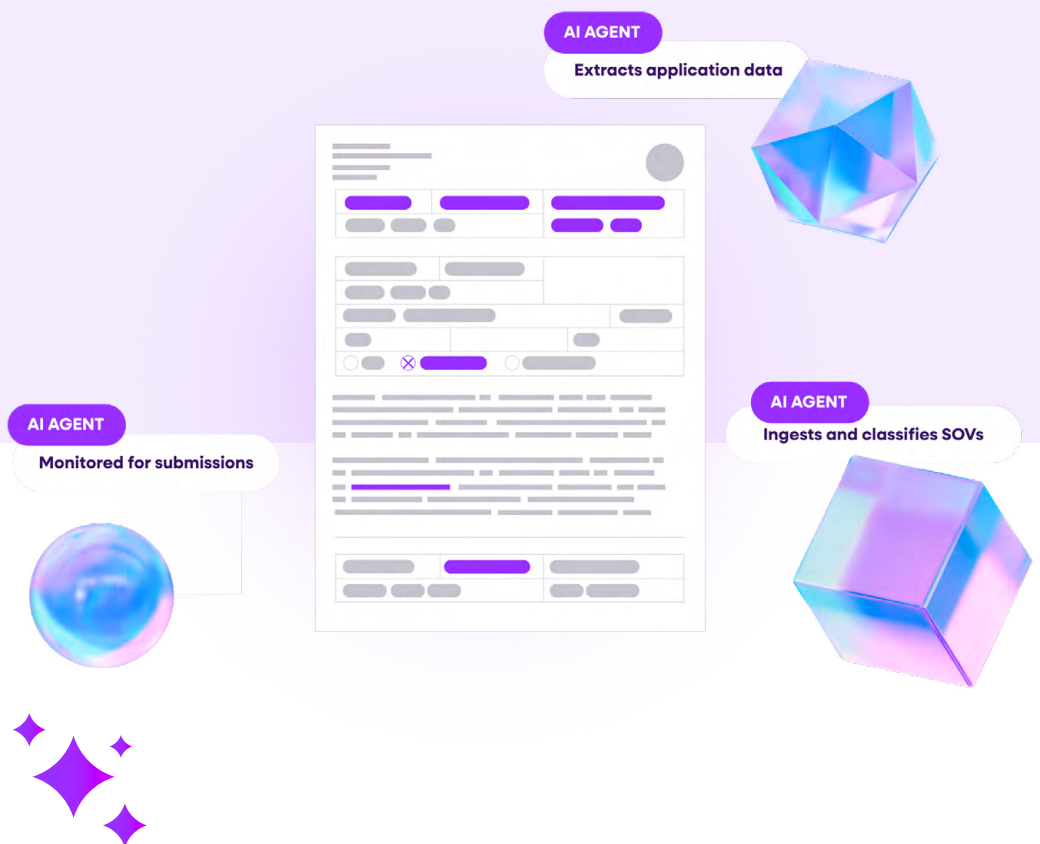


After experiencing how Phyllis supercharged claims document indexing, Eastern is looking to add additional AI Agents to their underwriting and claims teams.

Ready to partner with a vendor committed to your success?

Discover how Roots can empower your teams with AI and automation.

Schedule a personalized solution demo and see how our Performance Guarantee accelerates your transformation goals with confidence.



Visit roots.ai or contact us at sales@roots.ai to learn more.

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