Client Reference

Fleet Management | Insurance Management Tool

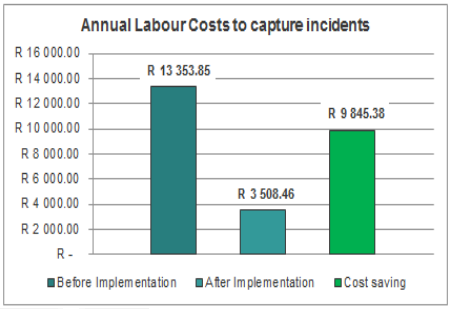
Client Background

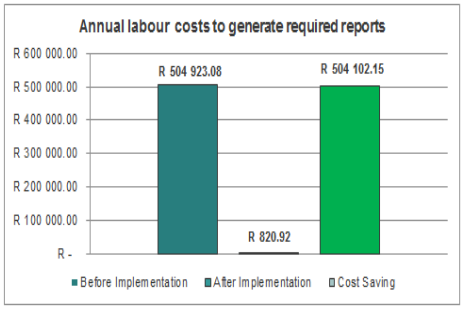
Our client owns and manages a large fleet of vehicles.
The management of insurance claims plays a vital role in the success of Fleet Management as a business area within our client's portfolio. Although these claims were managed well in the past, no proper management tool was available to manage the claims, and report on important statistical information relating to accidents and incidences. One fleet clerk is responsible for capturing on average of 38 claims per month, with each claim taking approximately 5 minutes to complete.

Key Challenges

Our client required an insurance management tool to manage and report on insurance claims and information efficiently. It also had to reduce the overall time it took to submit claims. We also addressed the following issues to minimise risk and improve the process:

- The tedious task to manage insurance claims.
- Unnecessary paperwork required in the management of claims information and documentation.
- Comprehensive information of insurance claims which were not recorded, or extremely limited.





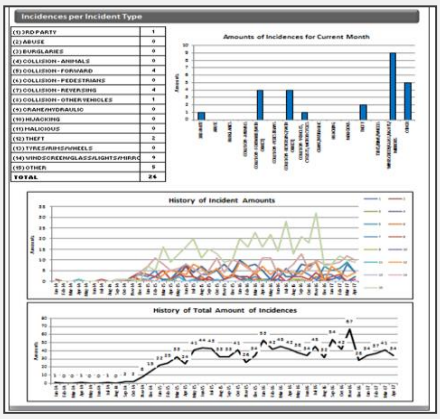
The implementation of the tool resulted in an actual annual saving of R9 845.38 on claim logging labour. There is also a potential report generating labour saving worth R504 102.15 per annum with the tool seamlessly generating 7 weekly and one monthly report.

Pragma Intervention

Pragma assisted with the development of an Excel-based tool for Fleet Management clerks.

The focus was to:

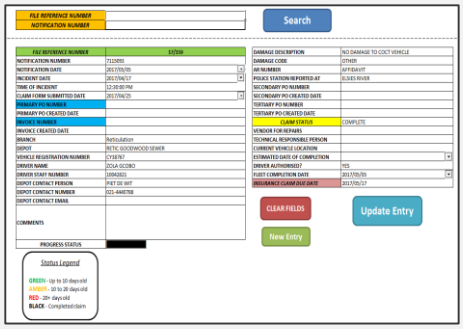
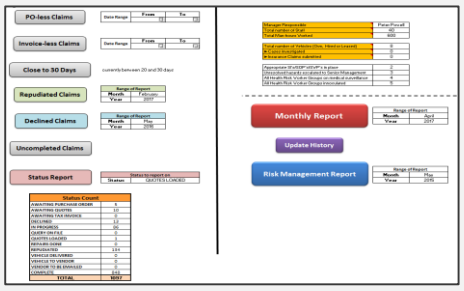
- Create a user-friendly application with a simple dashboard view that would ease the completion of claims.
- Include a reporting facility that did not require additional formatting before generating the report, but create the report with a single click.
- Provide different management reports focusing on:
  - The completion status of claims
  - Selected date ranges based on historical claim information.



Value Add

The Insurance Management tool added the following value to the client's processes:

- The information captured by the fleet clerk is more reliable.
- A report of claims information per status is generated on a single click of a button.
- The decrease in labour time resulted in reduced labour costs.

Tools and Technology

- SAP
- Microsoft Excel
- Visual Basic for Applications (VBA)