Digitizing Post Mortem Documentation Management

Case of Success

November 24th, 2023

IRIS GLOBAL

PEGA

IRIS GLOBAL

Home

Burial

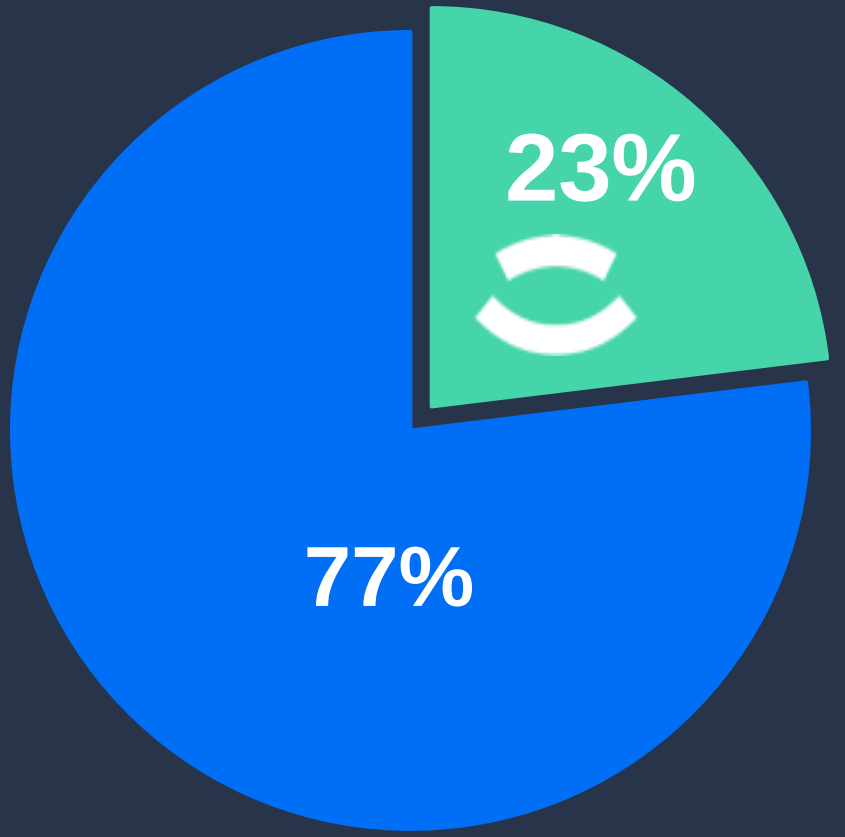
Contact Center BPO

Travel Assistance

Legal Aid

Health

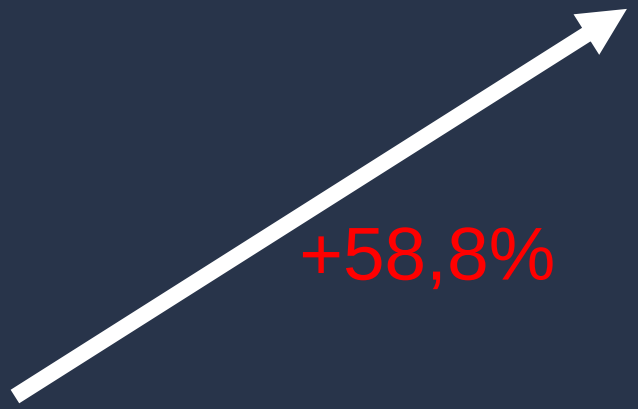
Iris Global handles 23% of burial services in Spain, providing services to leading companies in the sector such as Santalucía, SegurCaixa, among others.



2020

133.500

death records (2020)



85.000

death records (2019)

Death Certificate

Certificate of Last Will

Certificate of Insurance Contracts for Death Coverage

Civil Registry
Court of Peace

Ministry of Justice

Manual and individual application

On-site application

On-site and physical collection

Sending of physical documentation

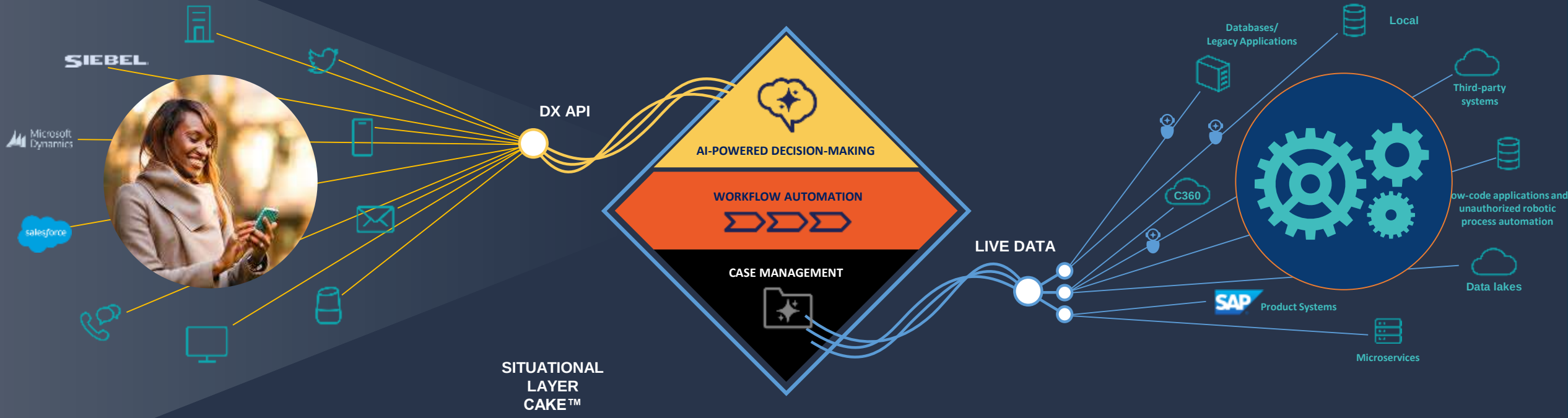
Increasing the number of pending cases

Increasing the number of days to deliver documentation to the client

Decreasing the NPS*

NPS: Net Promoter Score

Process Tranformation with Pega



CHANNEL INDEPENDENCE

Extend across all your digital channels with Digital Experience APIs

REUSABILITY

Specialization by product, customer, or region with the Situational Layer Cake™

DATA VIRTUALIZATION

Consume any on-premises or enterprise data source with Live Data

Pega solves three major problems and needs

1

Making Decisions

Offering 1:1 Capabilities: ***Personalized customer engagement*** powered by ***real-time omnichannel AI***

Get Work Done

Making customer-facing processes more efficient through ***No/Low-code development and end-to-end automation and Robotics (RPA)***

2

3

... and often <u>BOTH AT THE SAME TIME</u>, e.g. in the context of customer service: when interactions involve processing work to resolve a request

What we did

Case creation	Validate information	Certificates request	Receipt of certificates	Cerfiticates delivery
• Integration with Insurance Cores when a death notification is received	• Validate information with client only when it is not complete	• Online application using RPA without intervention of an agent	• Download certificates without intervention of an agent	• Deliver certificates automatically

This process applies for 80% of the cases, where the register is digitized

Some numbers

9,000
pending cases
September 2022

140
cases currently
pending

54.88%
NPS
September 2022

73.33%
NPS
September 2023

22.14
FTE’s released

Conclusions

- Digitalization impacts possitively: efficiency + experience
- Collaboration between public and private sector as a key factor of success
- Improve integration through API’s giving stability to the process
- Thinking massively

Q&A

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