



CASE STUDY [FINANCIAL SERVICES]

**promapp™**

**ClearView**

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**ClearView is an ASX-listed company which manages more than \$6.9 billion in funds and \$148 million in life insurance policies. ClearView has provided financial services to Australians since 1976.**

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ClearView's range includes investment, superannuation and retirement alternatives as well as life insurance cover, with their network of branches extending across New South Wales, Queensland, Victoria and Western Australia.

ClearView's senior management team realized some existing processes had become unclear, leading to inefficiencies and reduced productivity.

## Business Benefits

Simplified process and procedure documentation

Helped drive continuous improvement mindset within ClearView

Process information accessed anywhere, on any device

Easier to manage complaints, incidents and claims notifications workflow

Visual representation of how the organization operates



'We had in place a large number of process documents and training materials that had not been reviewed for a long time,' says Matthew Ream, Business Process Analyst at ClearView. 'As ClearView grew, some of our processes had changed however those changes were not accurately reflected in the supporting documents in the context of the larger organization.'

Ream says the situation was exacerbated by the fact that the company had a mix of long-term staff and more recent arrivals. Some were very used to existing processes while others brought with them different approaches to tasks.

'We knew we had some inconsistencies in place and needed to find a way to overcome this and provide a standard approach to our process management,' he says.

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**MATTHEW REAM**

Business Process Analyst, ClearView





## People driving change management.

A decision was made to go to market to find a better way of managing the firm's business processes.

After reviewing a range of options, the decision was made to implement Promapp. Planning and implementation was completed within five months.

'We started with workshops and training sessions to help drive staff engagement with Promapp's methods,' says Ream. 'We identified process experts in each team and adopted a 'buddy' approach so the process experts could test what they had documented on other staff members to ensure everything worked properly.'

One of the biggest initial benefits gained following the Promapp deployment was the company's ability to simplify its process for documenting procedures.

Promapp has also helped to drive a continuous improvement mindset within the company. Ream says the software provides a 'living tool' that visually represents how the organization operates.

**'Being a cloud-based system means it can be accessed anywhere and on any device. This is a big advantage when you have staff working across multiple locations.'**

**MATTHEW REAM**

Business Process Analyst, ClearView

## Do simply.



Ream says another benefit has come from the way in which Promapp is structured around an 80/20 approach. Most processes are standard and occur 80 percent of the time, while the remaining 20 percent can be captured through 'what-if' scenarios, which helps to keep day-to-day operations on track.

'Internally we call it the 'do simply' approach,' he says. 'We wanted a system that was easy to use, easy to understand, and easy to manage. Promapp ticks all those boxes.'

He says Promapp has also helped ClearView create a series of forms that help manage workflow in key areas such as complaints, incidents and claims notifications. Each can be directly linked back to the processes so that any changes that might be required can be readily identified.

Ream says the company is now focused on implementing a continuous improvement program, using Promapp to improve focus on quality and reporting.

'Promapp ensures that owners of processes are alerted when any changes are made, thus ensuring quality and consistency at all times,' he says. 'It has proven to be a very valuable tool for our company.'

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# About Promapp

At Promapp, we believe that expressing and managing process knowledge simply is crucial to sustaining an ongoing culture of process improvement. With Promapp's intuitive cloud-based BPM software, used by hundreds of organizations worldwide, anyone can create, navigate and change business processes.

Sign up for a [30-day free trial](#) or [join an intro webinar](#) to see Promapp in action.

## Connect with us.

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