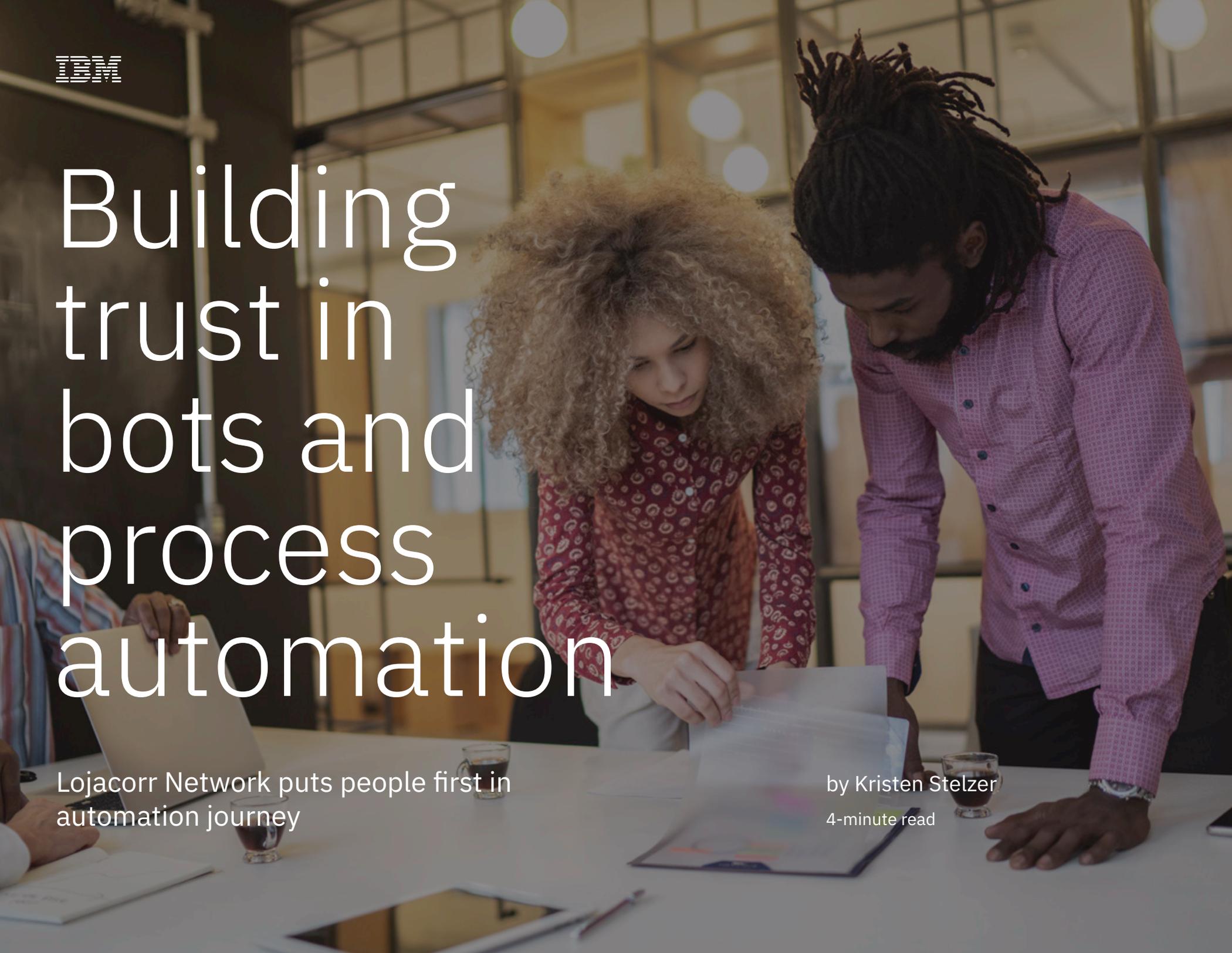




# Building trust in bots and process automation

Lojacorr Network puts people first in automation journey

by Kristen Stelzer  
4-minute read



Complex industries are rife with opportunities for technology to improve their processes. The right automation can increase efficiency, reduce errors and release human capital for more value-add purposes. The gains can be big, but there are two hurdles that can prevent companies from achieving these gains: the technology itself and its execution.

Lojacorr Network, the largest independent insurance brokerage network in Brazil, encountered both of these issues in its journey to automation. Lojacorr distributes



insurance through a qualified network of brokers. It also partners with large insurance companies.

“Our goal is to add value from end-to-end in order to generate profit for the insurance companies working with us and for the brokers who are our main clients,” explains Sandro Ribeiro, Chief Information Officer (CIO) at Lojacorr.

“We want to help Brazilians be better protected through a qualified network of brokers and insurance companies, offering the right insurance products for people at different points in their life.”

So Ribeiro started looking for new ways to generate value and remove friction. Automation seemed like it would do both.

Ribeiro's team started its automation journey with a pilot project. They used a small, local supplier to automate Lojacorr's internal payment monitoring process. This process notified customers when their payments were close to expiring so they could pay and not lose their insurance. His technology team wanted to test the benefits of automation and discover any challenges.

One of the main challenges was the sustainability of the solution. The pilot project produced gains, but the solution didn't support updates required for the team's dynamics.

The improvements were too good to ignore, though. So Ribeiro and his team looked for other solutions in the market. They wanted something to provide more robustness. They also needed to get buy-in from their users.

Increases  
efficiency by

80%

for process execution

No new hires needed  
to achieve volume  
processing of

700

payments per day

# Building bot buy-in

The team researched several providers. However, many of them had no local representatives. If they did, they were just small offices selling licenses, with little or no support. And the costs of the solutions were higher than the Lojacorr team was looking for.

Then they found the [IBM® Robotic Process Automation \(RPA\)](#) solution. “One of the main reasons we chose IBM was the customer service it provided,” says Ribeiro. “That gave us the confidence to move forward.”

The team liked that the solution uses IBM RPA Studio software, which they can use in-house to create their own bots. And they found it to be a more cost-effective solution than others in the market.



That settled the technology, but Ribeiro still needed user buy-in to solve the execution problem. Company stakeholders needed to understand the automation journey. “There was a lack of trust in the automation and that it would help us achieve our efficiency and reliability goals,” he says.

To overcome these challenges, his team considered who would be affected by the automation and how they could be a part of it. “We included them all along the way, from mapping to decision-making,” he says. “We had them participate.”

The first RPA project focused on monitoring insurance information on insurance companies’ websites. The next projects monitored insurance defaults and notifications. Both had excellent results.

“RPA allows gains in efficiency at a very large scale. With faster access to information and greater data reliability and operational efficiency, automation is a strong ally for companies.”



**Sandro Ribeiro**, CIO, Lojacorr Network

“With RPA, internal teams and clients noticed the speed and agility in the availability of information and scale of growth. They started to understand the role of automation,” says Ribeiro. “They also learned new skills and saw new opportunities that come along with automation.”

After those successes, the team decided to create bots. The local IBM team trained them and Lojacorr employees developed the automation with the low-code RPA Studio tools. Because they require very little coding experience, many people in the department were able to create their own bots.

Ribeiro’s team can now create bots to automate repetitive, manual processes that relied on third parties for resolution. These processes once generated stress on employees but now bring agility to the team. “We’re



also able to think of new ways to work,” he says. “And we can reinvent old processes that, because of the traditional models, used to limit our

creativity when we thought of using only human operations.” And with automation, the company can do all this without hiring as many people.

# Expanding efficiencies and increasing gains

Using RPA, Ribeiro met his short-term objective of automating high volume processes that were critical for reliability. And Lojacorr's teams have embraced the use of automation for other processes.

Since implementing RPA, Ribeiro's team has seen:

- An 80% increase in process execution efficiency without the need to hire staff to support the operations.
- The processing and notification of more than 700 payments per day.
- Quicker data capture and processing, providing information faster to brokers and clients.



- Greater security and reliability by avoiding human error in the high volume of repetitive processes.
- Better management and control of processed information.

In the long term, Ribeiro sees automation at the core of the company, permeating all possible areas. “RPA allows gains in efficiency at a very large scale. With faster access to information and greater data reliability and operational efficiency, automation is a strong ally for companies. In addition,” he says, “it provides speed and other benefits to the end client.”

As Lojacorr expands automation throughout the company and trains more people to work in automation, its partnership with IBM remains solid.

“We have a long-term relationship with them,” says Ribeiro. “They’ve been very engaged with us on our automation journey. And we offer suggestions that can benefit their other clients. It’s a real trusted partnership.”

“We’re able to think of new ways to work. And we can reinvent old processes that, because of the traditional models, used to limit our creativity when we thought of using only human operations.”

**Sandro Ribeiro**, CIO, Lojacorr Network



## About Lojacorr Network

Lojacorr is the largest independent insurance brokerage network in Brazil, with more than 55 offices throughout the country. Founded in 1996, it offers commercial support, technology, communication and marketing solutions that generate value to brokers. Lojacorr has more than 4,500 professionals operating within its insurance network. The company is headquartered in Curitiba, Brazil.

### NOTE:

The client featured in this case study initially engaged with WDG Soluções Em Sistemas E Automação De Proce LTDA which began conducting business as IBM on January 1, 2021. The WDG products in this case study, WDG Studio and WDG RPA, are now known as IBM RPA Studio and IBM RPA Solution respectively.

## Solution component

- IBM® Robotic Process Automation

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