Digitizing Post Mortem Documentation Management
Case of Success

November 24th, 2023
Iris Global handles 23% of burial services in Spain, providing services to leading companies in the sector such as Santalucía, SegurCaixa, among others.
2020
85,000 death records (2019)

133,500 death records (2020)

+58.8%
Civil Registry
Court of Peace
Ministry of Justice

Death Certificate
Certificate of Last Will
Certificate of Insurance Contracts for Death Coverage

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 Transformation with Pega

SITUATIONAL LAYER CAKE™
- Extend across all your digital channels with Digital Experience APIs

AI-POWERED DECISION-MAKING
- Specialization by product, customer, or region with the Situational Layer Cake™

WORKFLOW AUTOMATION

CASE MANAGEMENT

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

CHANNEL INDEPENDENCE
- REUSABILITY
- DATA VIRTUALIZATION

DX API

Extend across all your digital channels with Digital Experience APIs

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

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

Databases/Legacy Applications
Third-party systems
Low-code applications and unauthorized robotic process automation
Data lakes
SAP Product Systems
Microservices
C360
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

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

3. ... and often BOTH AT THE SAME TIME, e.g. in the context of customer service: when interactions involve processing work to resolve a request
What we did

- Case creation

  - Integration with Insurance Cores when a death notification is received

  - Validate information with client only when it is not complete

- Validate information

  - Online application using RPA without intervention of an agent

- Certificates request

  - Download certificates without intervention of an agent

- Receipt of certificates

  - Deliver certificates automatically

- Certificates delivery

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 positively: 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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