

# Bupa Transaction Validation



"Our business is already reaping huge rewards in terms of improved cash flow. All in all a great success with minimum disruption and maximum benefits"

Martin Kirby  
AR Manager, Bupa Wellness

"ConnectSales is flexible, innovative and rapidly implemented. It has had a huge impact on customer satisfaction, cash flow and even on resource costs."

## The Problem

Healthcheck invoices are complex in nature. Facing an urgent and ongoing need to issue accurate, timely invoices to customers, Bupa Wellness were faced with difficult legacy system functionality where inflexibility and inaccuracy issues were not only prevalent but seemingly insoluble.

This resulted in significant customer dissatisfaction and led to increased management overheads dealing with customer complaints and disputes relating to invoice inaccuracy.

Cash flow was greatly effected by significant delays while disputes awaited resolution. As a matter of urgency Wellness had to address this poor service to their customers, reduce the costs of delivery and markedly increase the cash flow in order to deliver the expected business profitably.

## The Issues

- 10,000's sales invoices/month
- Unacceptable error rate
- High customer dispute level
- Long delays for payment
- Unacceptable cash flow impact
- High manual checking costs
- High Management overheads
- Inadequate customer standards

## The Solution

In under two months the invoicing system has been totally transformed with the Connect Transaction Validation application configured to work seamlessly with Wellness' preferred processes and ERP data streams.

Invoices are now automatically filtered and verified where errors found are either automatically corrected or pushed through a managing correction workflow, thus guaranteeing that only accurate invoices reach the customer.

Clear reporting is generated by the Connect system so Wellness have complete confidence that quality is to the standard both they and their customers expect.

As Connect is an Internet-hosted application the data is stored securely off-site meaning no costly additions to Wellness' infrastructure and no increases to in-house IT department workloads.

## The Deliverables

- Automated workflow & rules
- Seamless customer interaction
- Automated electronic invoicing
- Clear reporting
- Management Information

## The Results

Accurate electronic invoices are now generated automatically and are being approved far sooner than before resulting in £million's every year being paid weeks earlier than previously.

Accuracy has improved significantly. Customer service is now delivering the quality of service expected by both Wellness and their customers. Staff are now fully focused on delivering cutting edge services rather than dealing with complaints and issue resolution.

Incredibly, these benefits are also provided at greatly reduced cost, allowing Bupa Wellness to maximise profitability and demonstrate business excellence to its customers whilst optimising investment in its original ERP solution.

## The Benefits

- 1,000's transactions per week
- Improved cash flow
- Significantly lower costs
- Paper eliminated
- Accuracy significantly improved
- Total traceability
- Real-time management
- Customer disputes eliminated

## The Client

Bupa Wellness is a division of Bupa providing health services via its Employee Assistance programmes to over 6,000 corporate customers throughout the UK including major supermarkets, airlines, manufacturers and financial institutions. It also caters for tens of thousands of people with individual Private Medical Insurance (PMI).

