

CUSTOMER STORY

Global general insurer automates workflow approvals

100

approvals processed each month

20k+

various request combinations to influence approval routing

3

levels of authority delegation

The customer

The customer is a global general insurer with over 2,000 employees, operating across five countries and managing more than \$2 billion in annual written premiums. The organization serves a diverse network of partners and policyholders through a wide range of personal and commercial insurance products.



Challenge:

manual approvals risk

The insurer relied on a paper-based process to route, approve, and process payments and claims across its extensive partner network. With over 20,000 possible combinations of partner, expense category, and account, staff were required to manually interpret each request and determine the correct routing for approval. This approach introduced significant operational risk, slowed down decision-making, and created opportunities for error.

Without audit trails or system-driven controls, approvals often piled up on desks, lacked clear follow-up, and offered little visibility into the status of requests. The lack of process transparency and consistency made it difficult to enforce financial governance and monitor performance across the approval lifecycle. The business needed a solution that would eliminate manual work, strengthen controls, and bring structure to a high-volume, high-variability process.



Solution:

smart routing logic

To modernize its high-risk, paper-based approval process, the insurer implemented an end-to-end digital workflow solution using Solvexia. The automation captures each payment and claim request, applies predefined business rules to determine the correct routing path, and seamlessly moves it through three levels of delegated authority, extending up to senior management.

The platform automates over 100 workflow steps, replaces manual routing with intelligent logic, and supports more than 20,000 request combinations across partners, accounts, and expense categories. Once a request is approved, the system generates bank-ready payment files, reducing manual handling and risk. Deployed in under three months, the solution also introduced live dashboards and status reporting, giving teams full visibility over performance and pending approvals.

Results:

enhanced transparency

The insurer now processes approximately 100 approval requests per month through a fully digital and auditable workflow. The elimination of paper-based handling has significantly reduced the risk of errors, while airtight routing controls ensure that each request follows the correct approval path—improving certainty, legitimacy, and compliance.

With real-time status tracking and automated follow-ups, approval bottlenecks have been removed, and teams now operate with greater clarity and accountability. The finance and operations teams can monitor activity and performance using newly introduced approval metrics and audit trails, reinforcing oversight and governance. Most importantly, the insurer has established a scalable and transparent process that strengthens financial control across its partner ecosystem—without adding administrative burden.

About Solvexia

Solvexia is a low-code platform that automates spreadsheet-driven data preparation and manual processes. It enables finance to free up their time by running processes 100x faster with 98% fewer errors, allowing businesses to reallocate essential resources to value-added work.

Finance and accounting teams choose Solvexia to unify data from systems and spreadsheets and automate their processes without involvement from IT. Its drag-and-drop interface makes it fast to deploy and easy to learn. Solvexia combines and manipulates data, performs calculations and creates interactive reports, analytics and smart dashboards for richer insights for your stakeholders.

You can leverage Solvexia to automate hundreds of processes for your company, including reconciliations, revenue and expense reporting, regulatory compliance, rebate management and much more.