



If your business units handle large volumes of incoming queries on a daily or even hourly basis, Zarion Allocate can increase efficiencies internally and improve your customer relationships externally. It gives your Supervisors and Team Leaders full visibility of all incoming queries, allowing them to see what needs to be done, who is doing it and make adjustments as they need to.

More communication channels means more work to be allocated

The Financial Services sector is highly process-driven – with set procedures, tasks and steps that need to be completed on a daily basis. Policies and regulations must also be adhered to and using one platform to identify and allocate tasks will enable your business unit to improve processes and overall productivity. It is not just about automatic delivery of tasks and in order to maximise productivity, matching tasks to the right person, not just the next person, is crucial.

Assigning work to the right person, in the right place, at the right time is something large financial services providers already deal with every day. Now, there is simply not enough time for Supervisors to use manual processes to collate, allocate and distribute tasks out to their teams. Increasing digital communications and a tech-savvy population means that customers interact in a different way and demand an instant response. As a service provider in the digital age, you need to deal with their queries quickly and efficiently.

You need a solution that enables you to easily quantify backlogs of work or to identify who in the team is busy or who may have spare capacity.



Sophisticated real-time dashboards enable supervisors to get complete visibility of all work items and supervisors can create their own reports based on current or historical data

What Zarion Allocate can do for you...

- Get more work done with less effort, time and stress
- Reduced costs, improved efficiency, improved agility and motivation
- Have greater visibility of the volume of work, backlogs and trends
- Make better, faster, more informed, smarter business decisions
- Automate manual and repetitive tasks and remove duplication
- Improved staff morale, increased productivity and enhanced customer service

“Using Zarion Allocate we improved our turnaround time to process claims and quotes and increased our underwriting capacity by 25%!”

- (leading global insurer)

Real-time, intelligent work allocation solution which gives the right tasks to the right people

Zarion Allocate automates the way work is assigned and delivered to people, based on criteria such as user availability and skills, authorisation levels and task deadlines. Work items are captured electronically and our intelligence engine provides automatic allocation for different types of work to multiple teams or departments. The daily working environment is always changing and Zarion Allocate is highly flexible and configurable and is designed to allow modification of rules by supervisors to ensure they can adapt to changing business requirements such as priority or deadline shifts. Zarion Allocate can be integrated into any process environment (e.g. workflow tools, document and case management etc).

Zarion Allocate takes into account a range of personnel and staffing issues including staff availability, capacity, capabilities, current workloads, authorisation levels and more.

Enjoy complete visibility

Supervisors and team leaders using Zarion Allocate enjoy complete visibility of work volumes, backlogs and trends. And they are confident in the knowledge that their teams are performing to optimum levels and that their department is running efficiently and meeting their deadlines. Your staff will be motivated by utilising their skills and being able to manage their workload without undue stress.

Zarion Allocate is used to assign work in the following areas:

- Claims Processing
- New Applicant Filing
- Mortgage Approvals & Offers
- Loan Applications & Approvals
- Direct Debit Mandates
- Pension Applications

And many more

Appreciate increased efficiencies

Organisations using Zarion Allocate report significant improvements in internal efficiencies and substantial man-hours saved in dealing with incoming queries, thanks to automated processes.

At ground level, waste is eliminated and bottlenecks are avoided as the right job always goes to the right person at the right time. Whereas before there may have been a dependency on key individuals, full visibility drives efficiency to a new level.

Why customers choose Zarion Software

Our experience built up over 20 years addressing workflow and process challenges in financial services has enabled us to develop innovative software which helps reduce costs, increase operational efficiency - and meet audit and compliance requirements.

Our teams of experts work closely with our clients to implement our software products, providing the knowledge and experience necessary to successfully meet the needs of global businesses and quickly and reliably deliver business benefit.

