

# Case study: Bupa

## A data and technology roadmap to transform customer journeys

### Highlights

- Customer journey mapping
- Existing technology and data audit
- Plan to address tactical dependencies
- Blended approach to make the most of existing resources
- Business case to deliver KPI uplift

### About Bupa UK Insurance

Bupa was created in 1947 in the UK with the founding purpose to prevent, relieve and cure sickness and ill-health of every kind. The company is driven by a passion to provide high quality, affordable healthcare. Today, Bupa is an international healthcare company, providing health insurance, treatment in clinics, dental centres, hospitals and care homes.

Health insurance is at the core of Bupa's work. The company delivers health services where they complement its position in health insurance. Bupa UK Insurance is a leading health insurer, with 2.2m customers.



### The Challenge

#### An achievable route to market-leading customer journeys

Richard Glassborow is the Direct Distribution and Marketing Director for Bupa UK Insurance. He explains: "Our challenge was no less than a marketing transformation. When I met with CACI a few months after taking up this role, I was looking for ways to transform our people, technology and data capabilities.

"Transforming our customer journeys was my top priority. We have a big customer base with many different journeys, from finding customers, bringing them into the funnel for conversion, on-boarding, renewing, retention and off-boarding, as well as managing claims. Customer expectations for personalised engagement are very high: they're set by technology-led organisations like Amazon. In healthcare, we needed to raise our game.

"I asked CACI to answer two key questions: What should our customer journeys be like, and what technology and data do we need to bring them about? The tricky bit was to understand where we were starting from and what we needed to enable the transformation, in terms of data. We needed to plot a course to a transformed marketing operation that delivered ROI. I asked CACI to tackle this project.

"These days, CMOs are having to become mini CTOs because of the importance of marketing tech in delivering their KPIs - it can be a real capability stretch. I see CACI as a trusted advisor to help me achieve this. They have got my back and offer the best advice."



**Team CACI understands the tech, the data silos, the infrastructure, our operational ways of working and what's realistically possible in the timeframes we have. Using their knowledge and intelligence, they have pieced together a strong and coherent roadmap and action plan for improved customer experience that will measurably uplift our KPIs. Because they understand us and the issues we face as an organisation, they are by our side as trusted advisors and partners.**

Richard Glassborow, Direct Distribution and Marketing Director, Bupa UK Insurance

## The Solution

### Technology and data roadmap with a plan for tactical dependencies

The end goal was to give Richard and his team a roadmap to transform customer journeys, alongside an assessment of current data and technology gaps.

Bupa had some challenges with lead conversion and retention, partly due to a lack of personalisation in their communications. For the transformation roadmap, CACI built a suite of private medical insurance (PMI) customer journeys for different life stages, then converted those into contact strategies which could be developed and activated through Bupa's Adobe technology platform. They were designed to be engaging, timely and relevant.

CACI looked at the technology and data dependencies in context of Bupa's existing and future resources, identifying the changes needed to give Bupa the customer experience capability it wanted. CACI's consultants produced a recommended strategic solution to transform data and technology by upgrading Bupa's IT architecture. They also identified a list of 56 tactical improvements to business as usual that were key enablers to the transformation.

The recommendations set out how the new data and architecture could be organised and how Bupa could then use its data more effectively, to deliver better personalisation.

## The Benefits

### A pragmatic, results-based roadmap and business case

Richard Glassborow is very pleased with the report and recommendations made by CACI. "This work has created clarity instead of ambiguity. It has given us momentum and given our senior team the assurance to take the next step. The tactical steps we've identified are key to breaking down barriers to change: we now have a credible plan to address them, so everyone is confident that the transformation is feasible."

CACI is a preferred partner to Bupa for technology and implementation. The teams are working together on several strategic projects, including the single customer view, marketing distribution technology, and this infrastructure solution.

Richard says, "CACI really understands our individual business and the way we work. Their expertise together with this contextual understanding of our approach and objectives means they have been able to add true value to this project, recommending an achievable and powerful solution that connects our existing data and tech."

"The calibre of the CACI team really stands out. They have a great blend of experience and an ability to grasp what we're trying to achieve, curating ideas and recommendations based on a deep understanding of Bupa. It always feels like a partnership."