



Transforming Operational Efficiency with Autologyx

## CASE STUDY







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Lockton, the world's largest privately held insurance brokerage, provides tailored risk management, insurance, and employee benefits solutions. Known for its client-centric approach, Lockton serves a diverse range of industries, offering innovative strategies that help businesses navigate complex risks. As a rapidly growing organisation, Lockton consistently seeks cutting-edge technologies to enhance operational efficiency and deliver exceptional client outcomes.

Over a period of five years, Lockton has partnered with Autologyx to drive evolution - streamlining processes and enabling technological advancements.

Jordan Moss, Senior Vice President at Lockton, shares his insights on leveraging Autologyx to revolutionise workflows and enhance efficiency. This reflects Lockton's commitment to continuous improvement through strategic technology adoption.

## The challenge

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The Real Estate team at Lockton is recognised for its market-leading technology, delivering services to clients and the insurance market through their 'Asset' system. As the team expanded, it became apparent that there was an opportunity to further enhance operational efficiency to better serve clients. Lockton recognised the importance of ensuring their high standards of service were maintained and improved, and sought an innovative approach to achieve this.

With a strong client-focused mindset, Lockton identified the need to refine and manage the growing volume and complexity of its workflows, while consistently delivering exceptional service. To support Lockton's continued growth and enhance operational agility, the decision was made to implement a platform that would seamlessly integrate with existing systems and deliver measurable improvements. By embracing innovation, Lockton aimed to further empower its team to focus on providing high-value client services.

The existing operational setup, while having served its purpose, presented opportunities for optimisation in terms of both efficiency and scalability, particularly as client volume increased.

Areas for enhanced evolution:

### EFFICIENCY DEMANDS:

Tasks such as collating, negotiating, and distributing high-volume client renewals were becoming increasingly time-consuming. Generating a single renewal letter could take up to 40 minutes, with over 1,500 renewals processed annually.

### CONSISTENCY ENHANCEMENT:


Manual workflows introduced the potential for inconsistent outputs, and the potential for variability in client documentation.

### SCALABILITY REQUIREMENTS:

Some existing processes, while structured and functional, lacked the flexibility required to scale operations further with the evolving needs of the business.

Jordan summarised the need for evolution:

"Our long-standing processes had reached a point of significant operational constraint. They simply couldn't scale, and they weren't cost or effort-efficient. This realisation drove us to seek a streamlined, scalable solution, leading to our partnership with Autologyx."



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# The Solution

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Lockton partnered with Autologyx to address its operational challenges, leveraging the platform's flexibility, integration capabilities, and iterative approach. The initial focus was on automating the facility renewals process, a high-volume, low-value task that was consuming significant resources. Following the success of this initial implementation, the team expanded Autologyx's role across broader use cases.

Key reasons for choosing Autologyx included:

## EASE OF INTEGRATION

Autologyx's ability to integrate seamlessly with Lockton's existing systems was a critical factor in its adoption. The platform acted as a unifying layer, enabling different databases, processes, and teams to work together efficiently. This allowed Lockton to build on its existing infrastructure rather than undergoing a costly and disruptive overhaul.

"Autologyx doesn't have to replace other things that are doing a good job. It's the glue that brings everything together."

The integration capabilities of Autologyx allowed Lockton to automate data flows between systems, reducing manual data entry, ensuring consistency, and freeing up resources for higher-value tasks.

## ITERATIVE DEPLOYMENT

Autologyx's iterative approach enabled Lockton to de-risk its digital transformation efforts. Instead of committing to a large-scale investment upfront, the team could implement solutions incrementally, test them, and scale as needed. This flexibility made it easier to demonstrate value early and secure buy-in for subsequent phases of the project.

"We didn't have to do a massive investment and hope it worked. Autologyx allowed us to de-risk projects by starting small and building iteratively."


By starting with a focused proof of concept for facility renewals, Lockton was able to automate repetitive tasks, measure the results, and use the success of this project as a template for future deployments.

## CUSTOMISED SOLUTIONS

Lockton leveraged Autologyx to create bespoke workflows tailored to its specific business needs. The flexibility of the platform allowed the team to customise processes, ensuring they aligned with Lockton's operational goals and regulatory requirements.


"I like it because I can fit it into the business rather than force the business into the technology."

For example, the team automated the creation of renewal letters, a previously labour-intensive process. The automation ensured that letters were generated consistently, tailored to each client's needs, and processed much faster than before.



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It's the glue that brings everything together.



## PROOF OF CONCEPT SUCCESS

The first implementation of Autologyx focused on automating the facility renewals process. This task, which previously required substantial manual effort, was transformed into an efficient, fully automated workflow. Key aspects of this success included:

- Automating the creation of renewal letters and documentation for over 1,500 annual renewals.
- Standardising outputs to ensure consistency and compliance.
- Integrating with APIs to synchronise data across systems, reducing duplication and errors.
- The success of this project validated the platform's potential and encouraged Lockton to expand its use across the business.

Broader applications included:

**Facility Business Automation:** Transforming, high-volume tasks into fully automated processes, allowing the team to reallocate resources to strategic initiatives.

**Regulatory Compliance:** Seamlessly incorporating sanctions checks and other regulatory requirements, ensuring compliance while minimising manual intervention.

Following these successes, Lockton applied the lessons learned to other areas of the business, including risk placement, compliance workflows, and client management processes. The platform's modular approach allowed the team to build additional solutions incrementally, ensuring that each deployment delivered tangible value.

With Autologyx as a core enabler, Lockton transformed its operations, streamlined key workflows, and positioned itself for sustained growth and innovation.

# The Results

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Lockton's partnership with Autologyx has been a resounding success, delivering significant operational efficiencies, empowering employees, and creating a platform for continuous transformation. By embracing the flexibility and modularity of Autologyx, the company has redefined how it approaches business processes and positioned itself for sustainable growth.

## FLEXIBILITY AND INTEGRATION

Autologyx acted as the "glue" that brought together Lockton's existing systems and processes without requiring disruptive overhauls.

## SCALABILITY AND EFFICIENCY

Hundreds of hours of manual work have been eliminated annually, freeing up employees to focus on higher-value tasks and enabling Lockton to scale without proportionally increasing headcount.

## ITERATIVE DEPLOYMENT

By deploying the platform in small, manageable phases, Lockton reduced risk, demonstrated value early, and ensured alignment with its business goals.

## IMPROVED EMPLOYEE SATISFACTION

Employees now spend more time building client relationships and solving problems, leading to increased job satisfaction.




100s of hours of manual work eliminated annually

Reduction in renewal processing time from 40 minutes to near-instantaneous


Initial projects delivered an ROI equivalent to 5 full-time employees, growing to 10 as the platform expanded

Freed up 10 team members to focus on high-value client work



We didn't have to do a massive investment and hope it worked.

Autologyx allowed us to de-risk projects by starting small and building iteratively.





## Future Plans


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Lockton is far from finished in its journey with Autologyx. Over the next 18 months, the company plans to complete its interoperability hub, a modular framework that integrates core processes like client management, risk placement, and regulatory compliance. Additionally, the company aims to:

- Leverage AI-powered tools to further enhance efficiency in areas such as data analysis and regulatory checks.
- Expand Autologyx's use to additional business lines, creating new opportunities for automation and integration.
- Scale the platform to adapt to future needs while maintaining the flexibility to integrate emerging technologies.

Jordan Moss describes the vision:

"What we're building now enables constant transformation. It's not just a project we complete - it's a platform for continuous innovation."



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The adoption of Autologyx has enabled Lockton to evolve into a more agile, efficient, and innovative organisation. By automating repetitive tasks, integrating existing systems, and empowering employees, the company has not only solved immediate challenges but also laid the foundation for future growth.

"Autologyx has transformed how we work, allowing us to scale efficiently, repurpose resources, and focus on delivering value to clients. It's a critical enabler of our business transformation."

As Lockton continues to expand its capabilities and embrace innovation, Autologyx will remain at the heart of its strategy, driving operational excellence and ensuring the company stays ahead in a competitive industry.



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