



Pioneers of *Effortless* Learning & Development

## Case Study



### About our client

A UK & European  
health insurer

## The Brief

Following a S166 review, the client was required to make a series of upgrades and changes to their documentation and risk model. This task required accuracy, attention to detail and a clear understanding of the current regulatory and legislative information.

The requirements relating to documentation meant that a wholesale review of all policies and protocols was essential. The brief was to review each of the organisation's documents to ensure they met with the required standards of consistency and layout. The content of each document also had to meet and comply with the current regulatory, legislative and legal requirements and finally be archived in a format that enabled the item to be found and referred to by all relevant members of staff.

The amendments to the risk model were undertaken separately by another team.

## The Process

Working closely with our client it was agreed to design a standard format and layout for all documentation and to also construct an archive, review and retrieval model that enabled document owners to maintain documentation in an up to date format and continuing to comply with any business, regulatory or legislative changes.

Having reviewed all documentation for content accuracy each item was then reproduced in the new format and relevant references were applied to each. Those policies or protocols that needed to be rewritten were produced and sent over to the relevant document owner who then approved content and signed off their agreement.

The entire upgrade and archiving took over three months to complete, gaining agreement to provide or sign off content was to prove time consuming with many staff members not available or no longer taking responsibility for the policy or protocol.

## The Results

All documentation conformed to the new agreed format. The content was brought up to current levels of understanding and all received the necessary sign off and archived in the relevant areas.

During the project we were also able to reformat and rewrite every single job description for the HR team which enabled them to apply new grading's for each job role.