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High-Volume Processing, Real-World Transformation



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Agenda

Achieving System Performance

1. Introductions
2. Straight to the Metrics
3. Methodology
4. Responsibility of Leaders



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Speakers Intro



Travis Iommi

Vice-President of IT & Technology

KW Specialty



Mike Jandoli

Project Manager

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Areas of Focus

The project team identified 3 “pain points” that required action to create a mature and scalable system

Numbers Increasing

1

Churn Rate

Defect Churn

The number of defects created was greater than the number of defects resolved each month

Systems not in sync

2

Application Sync

System Sync

Different applications often had incorrect and different values

Speed to Market vs Performance

3

Performance

Processing & Performance

The system processes were built for “speed to market” and not “system performance”

Prework

Implement reporting functions → increased triage efficiency → better understanding of root causes → better solutions to correct root causes → reduces the overall errors in the system

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STRAIGHT TO THE METRICS

Defect Churn

Snapshot of defect throughput for 2024 and 2025

926
Defects Created

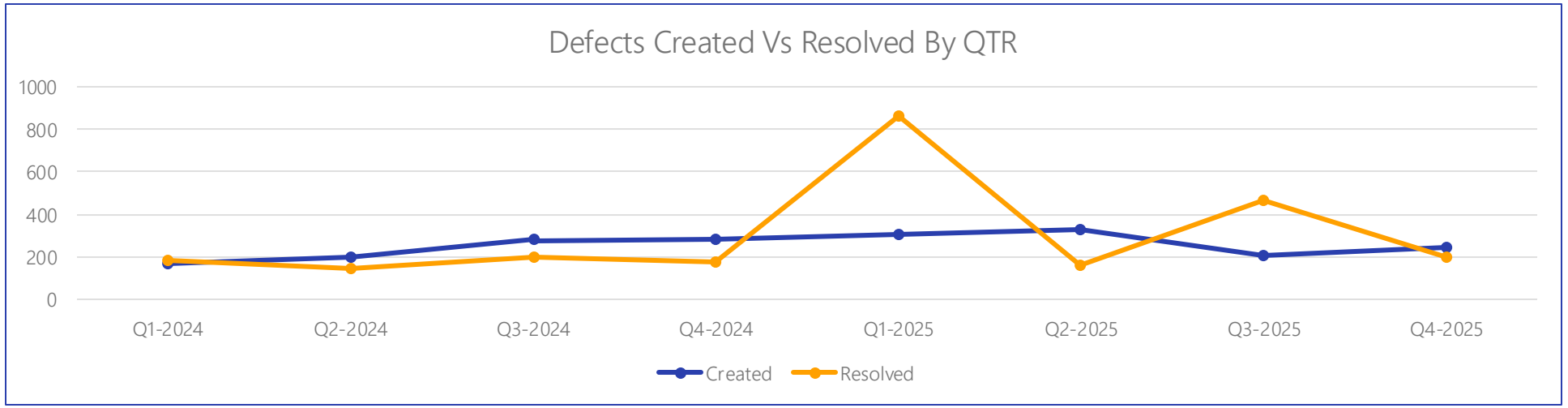
706
Defects Resolved

1,078
Defects Created

1,683
Defects Resolved

2024

2025



	Created	Resolved
Q1-2024	166	184
Q2-2024	198	145
Q3-2024	280	199
Q4-2024	282	178
Q1-2025	307	863
Q2-2025	325	158
Q3-2025	202	464
Q4-2025	244	198

Pre-work

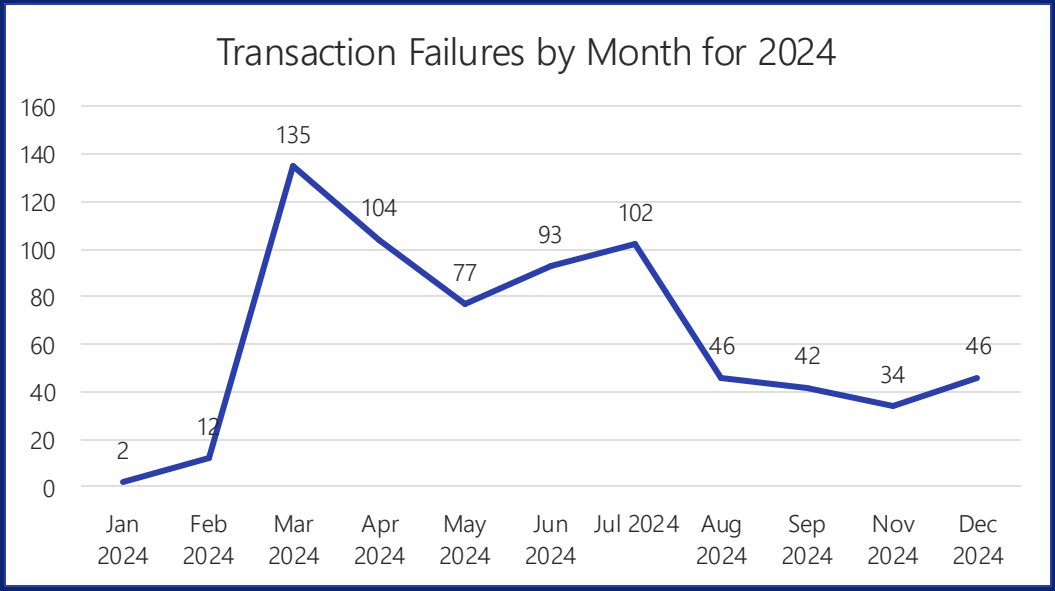
Implement reporting functions → increased triage efficiency → better understanding of root causes → better solutions to correct root causes → reduces the overall errors in the system

System Sync

Count of instances where “system A” data did not stay synchronized with “system B”

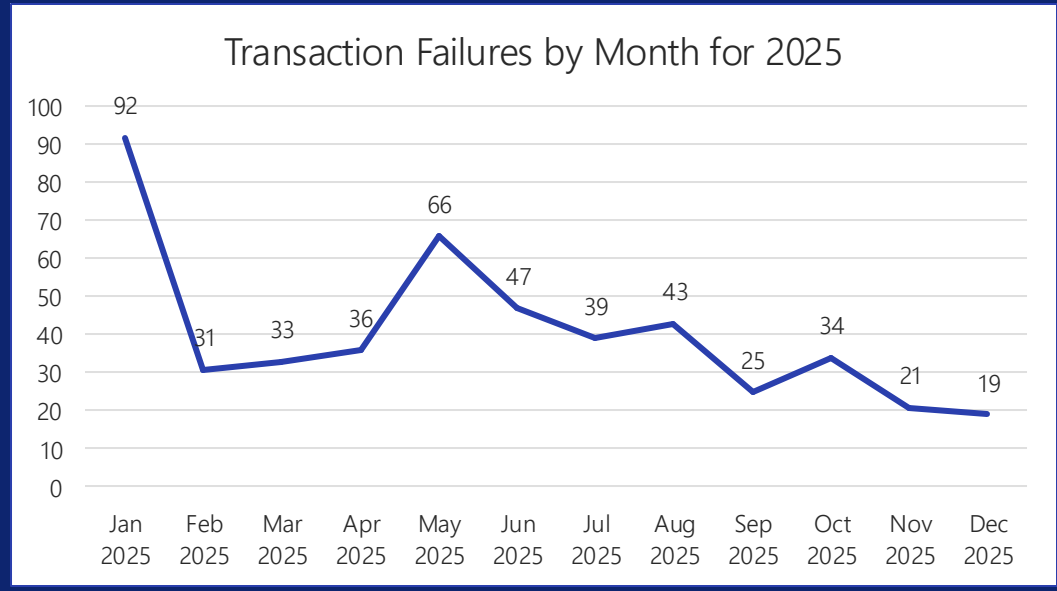
2024 Transaction Metrics

Total transaction failures = 693
Total transactions processed = 90,721
Success rate = 99.23%



2025 Transaction Metrics

Total transaction failures = 486
Total transactions processed = 113,843
Success rate = 99.57%



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Processing & Performance

The project team identified 3 “pain points” that required action to create a mature and scalable system

“Batch Invoice Process”

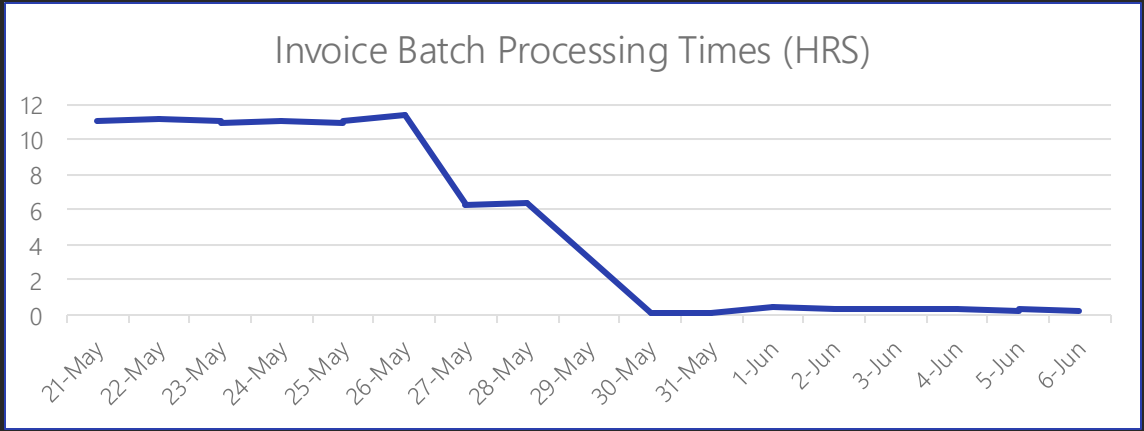
- Identify an invoice is needed
- Generate and store invoice document
- Transmit invoice to 3rd party print vendor

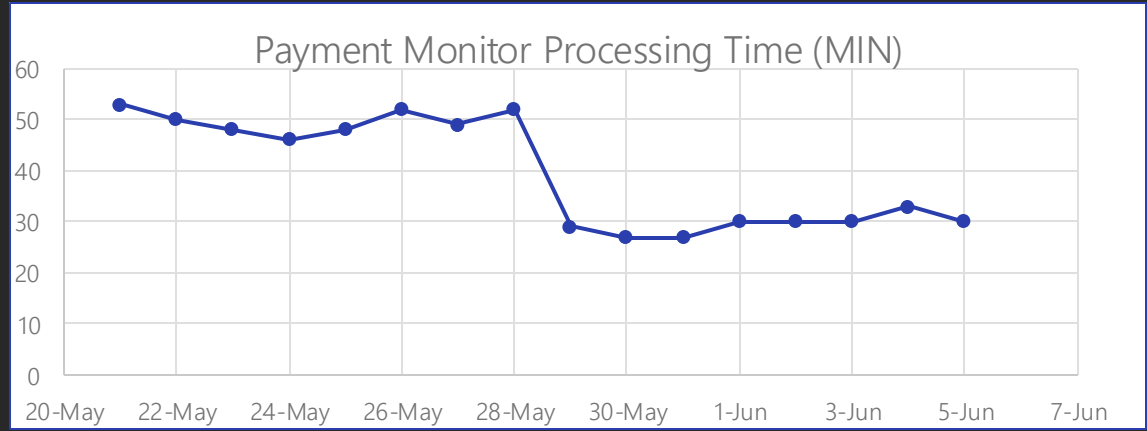
“Payment Monitor”

- Calculate equity days
- Execute NOIC processes
- Execute non-pay cancellations
- Reinstate account if payment was received

“Data Table Clean-Up”

- Purge abandoned quotes
- Purge batch controller tables
- Purge other tables as identified





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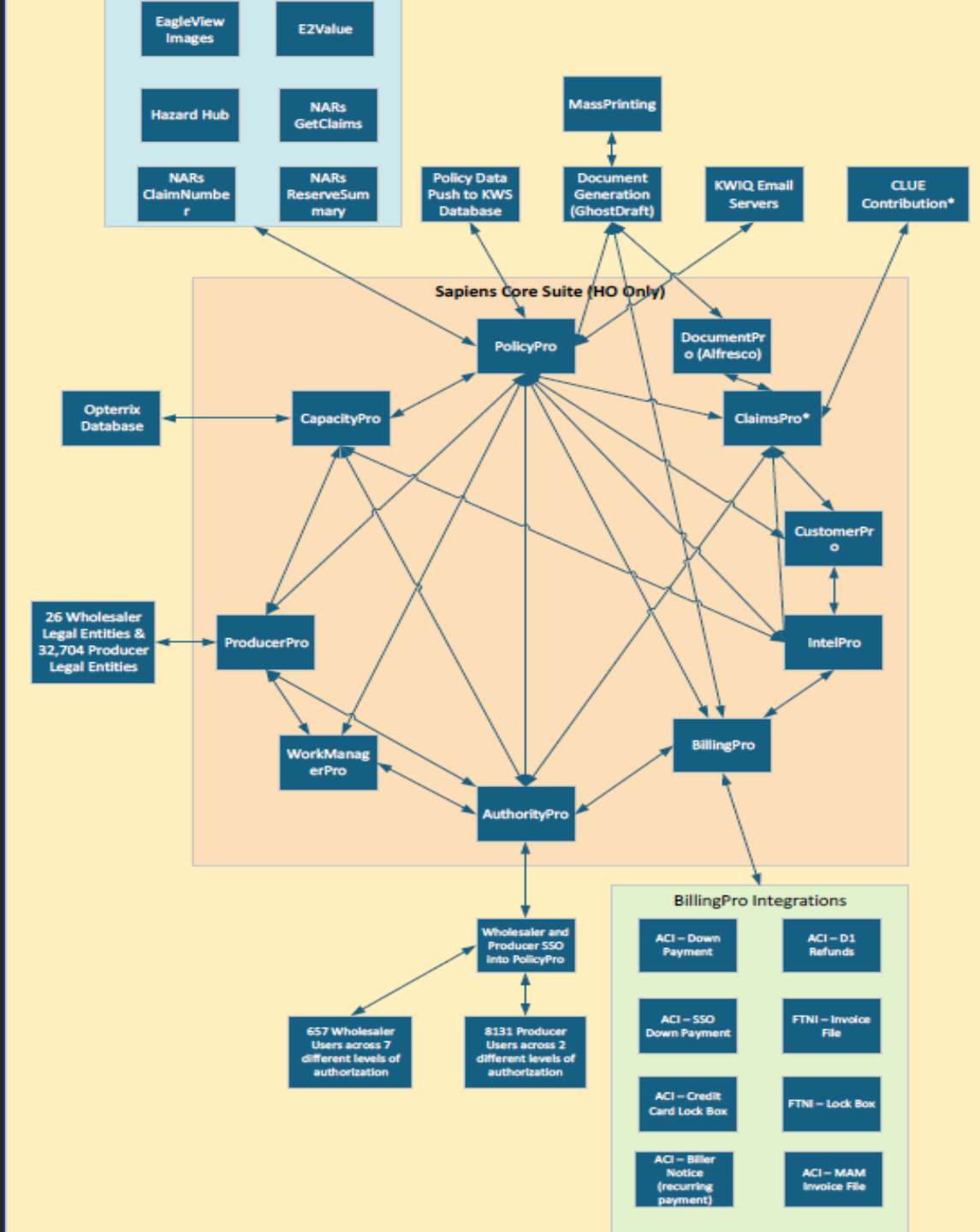
METHODOLOGY

Know Your Environment & Processes

- Document the high-level integrations
- Review the step-by step process
- Review dependencies
- Find the bottlenecks
  - XSLT's are notoriously slow
- Design the plan and stick to it

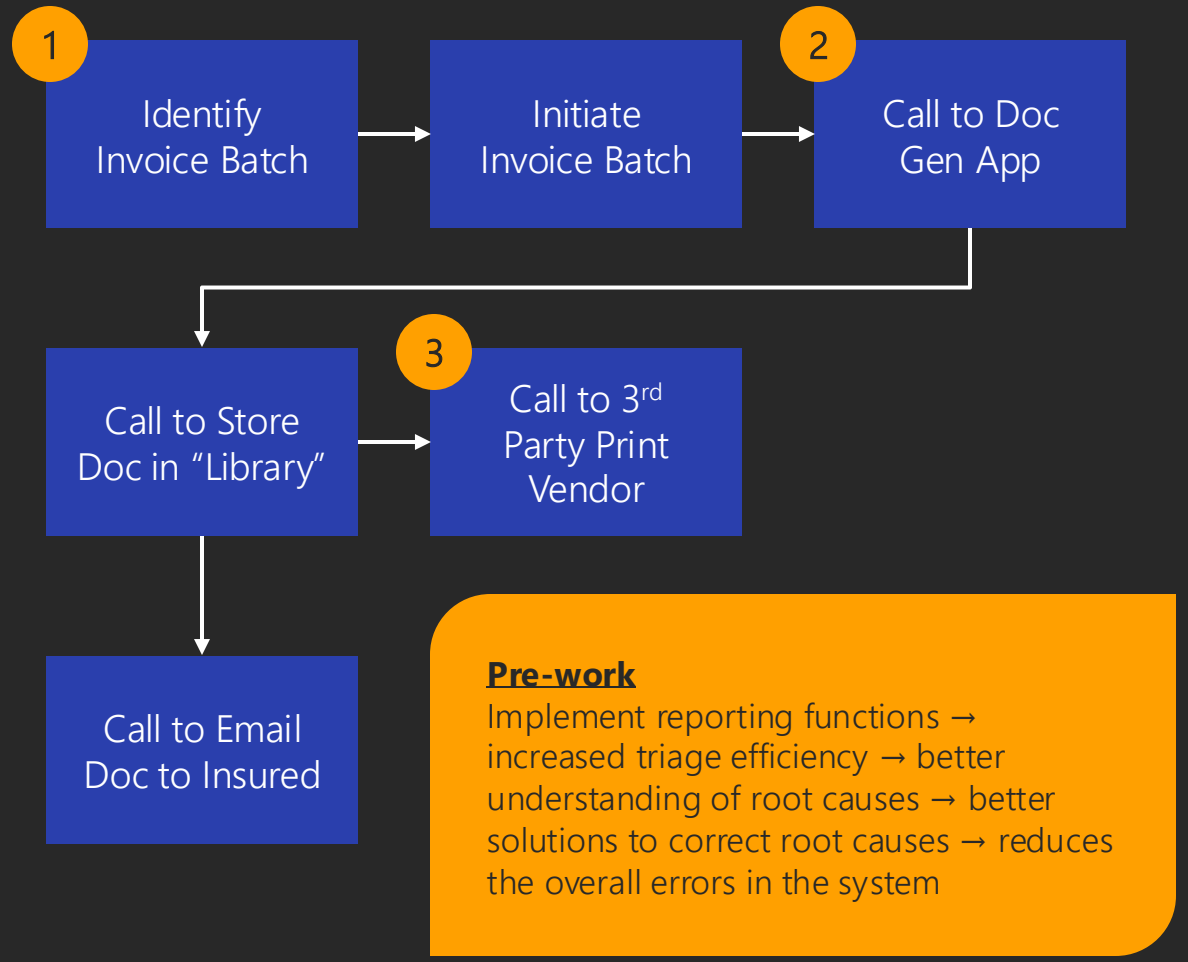
Pre-work

Implement reporting functions → increased triage efficiency → better understanding of root causes → better solutions to correct root causes → reduces the overall errors in the system



Know Your Environment & Processes

Invoice Process – Example



Pre-work
Implement reporting functions → increased triage efficiency → better understanding of root causes → better solutions to correct root causes → reduces the overall errors in the system

1: Identify Invoice Batch

- Old dependencies: None
- New dependencies: Bypass if any of the following conditions are true – 1 Policy is "cancelled" 2 Policy is "expired" 3 Amount due is $0

2: XSLT and data transmission

- Old payload was "full account XML"
- New "skinny" payload was only needed data elements

3: Connection and transmission to print vendor

- New connection protocols and locations

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Stay the Course!

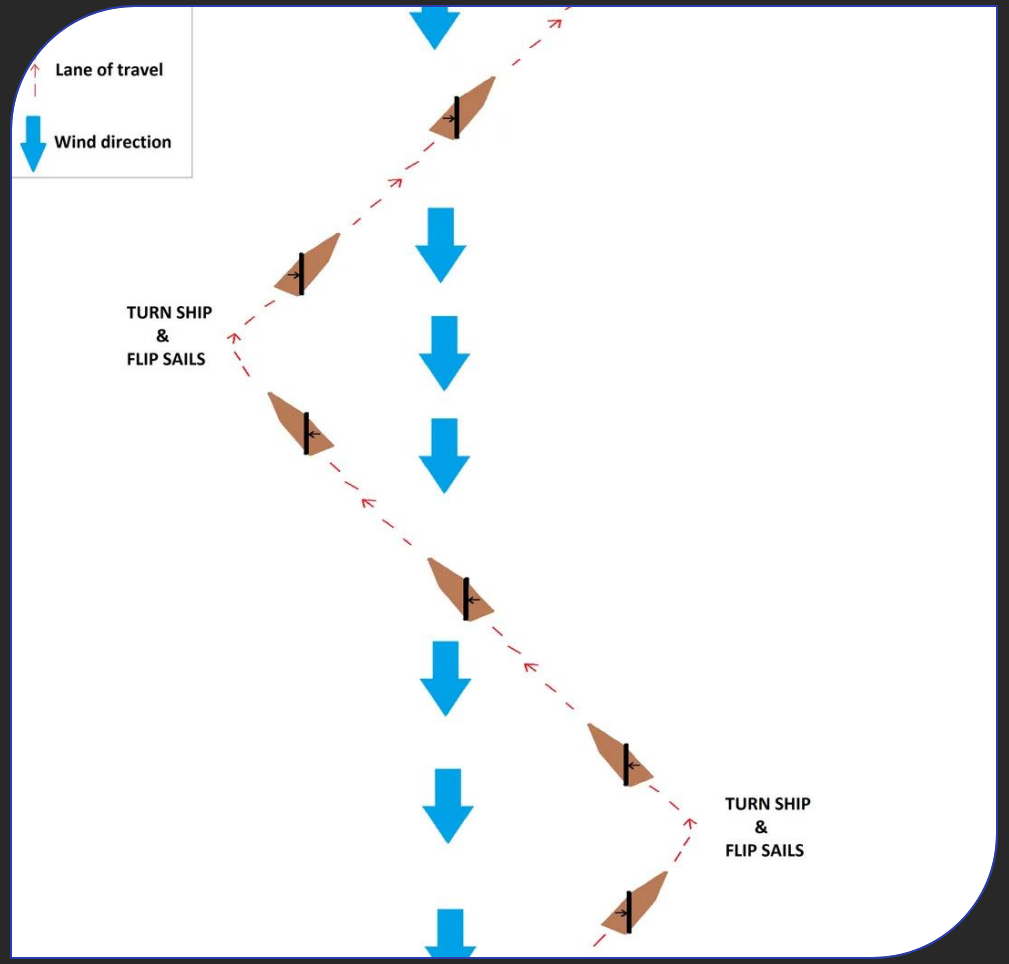
Responsibility of Leaders

1. ADKAR across the organization
2. Don’t be reactive

   Stay the course!
3. Give the team time and don’t change priorities

   Stay the course!
4. Show all department the improvement

   Stay the course!



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