

## Executive Summary

Aon PLC transformed a manual resource-intensive escalation workflow into a fast, automated process by extending ServiceNow beyond its out-of-the-box limits. Service Bridge, a ServiceNow solution that enables secure service and workflow collaboration across separate ServiceNow instances, was unable to accommodate Aon's complex multi-account environment. To address this challenge, Aon partnered with INRY to build a custom bi-directional integration powered by UI Actions and Flow Designer. The outcome was immediate and measurable: incident creation times reduced from minutes to seconds, handling efficiency improved by 35–45%, and SLA adherence increased by up to 30%.

## When manual escalation between CSM and ITSM limits service quality

Aon PLC is a professional services firm operating in risk management, insurance, and reinsurance, with approximately 10,000+ employees and operations in 120 countries.

Escalating cases from CSM to ITSM was a completely manual process. Whenever an incident was required, a team member had to read the case, re-enter all the



details into the ITSM instance and create the incident by hand. This repetitive workflow led to delays and inconsistencies in how information flowed between the

~35–45%  
faster ticket  
handling

~40%  
operational  
efficiency  
gain

~25–30%  
faster SLA  
adherence

Minutes to  
seconds

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two systems, and syncing information from case to incident, and back, was never fully reliable.

Automation was blocked by a product constraint. ServiceNow's out-of-the-box Service Bridge functionality imposes a single-account limitation: the native UI Action and Flow for creating Remote Tasks only function when a case's account matches the single account configured for the connection. Because Aon manages cases across multiple customer accounts, native integration was unusable in its environment.

The impact reached across operations. Manual incident creation introduced delays, increased the risk of errors, and made it difficult to maintain synchronized communication between the CSM and ITSM instances. These gaps hindered service quality and turnaround time, and limited Aon's ability to scale support operations because the process did not allow automation across its diverse customer accounts.

## When Manual Escalations Slow Down Service

Aon PLC, a global leader in risk, insurance, and reinsurance with 10,000+ employees across 120 countries, was facing a hidden but significant operational drag.

Every escalation from CSM to ITSM required manual effort. Team members had to review each case, re-enter details into a separate system, and create incidents from scratch, creating delays, inconsistencies, and gaps in how information moved between systems. Keeping cases and incidents in sync was difficult and often unreliable.

Attempts to automate the process quickly hit a hard limitation. ServiceNow's out-of-the-box Service Bridge supports only a single-account connection, meaning its native UI Actions and flows could not operate in Aon's multi-account environment. For a global organization managing diverse customer accounts, this made standard integration unusable.

The impact was widespread. Manual workflows slowed response times, increased the risk of errors, and made it harder to deliver consistent, high-quality service—ultimately limiting Aon's ability to scale its support operations effectively.

## A long-standing **ServiceNow** partnership

Aon turned to INRY, building on a long-standing partnership shaped by successful ServiceNow engagements. INRY's proven track record in implementation and platform support, combined with deep expertise in CSM and ITSM integration, made it a

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natural choice to help solve this complex challenge.

## Building an automated, bi-directional Service Bridge integration

INRY delivered an automated, bi-directional integration between Aon's CSM and ITSM instances using Service Bridge. With a single click on a case, an incident is generated in ITSM,

and all relevant information synchronizes bi-directionally between the two instances using Remote Task Definitions, Transforms, and the Remote Task record. The solution brought together:

- ServiceNow CSM (case management) and ServiceNow ITSM (incident management)
- Service Bridge for cross-instance record synchronization
- Flow Designer for automation
- A custom UI Action and custom Flow for generating remote tasks

The engagement covered integration design, workflow automation, platform configuration, and custom development, along with requirement refinement, solution validation, and collaborative troubleshooting to ensure the approach met both

business needs and ServiceNow technical best practices.

INRY collaborated closely with Aon's functional and technical teams to understand current workflows, account structures, and integration challenges, and engaged ServiceNow experts to analyze the limitations of the native product behavior and confirm the viability of the custom approach. Regular working sessions, joint testing cycles, and transparent communication kept all stakeholders aligned throughout.

## Solving the **single-account constraint**

Rather than rely on the restrictive out-of-the-box remote task creation, INRY recreated that process using a custom UI Action and a custom Flow. The customization produces the same Remote Task record while bypassing the single-account constraint, so incidents are created automatically from case records regardless of which customer account a case belongs to.

The approach stayed fully aligned with the Service Bridge architecture, introducing a precise, minimal customization that enabled the integration to function seamlessly across multiple accounts and both instances. It removed the need for manual incident creation while replicating out-of-the-box logic with targeted customization inside the ServiceNow framework.

## Results and impact

Aon experienced significant improvements in speed, efficiency, service levels, transparency, and platform health.

### Speed and efficiency

- Ticket handling time decreased by ~35–45% per ticket, saving 6–8 minutes per request by eliminating duplicate ticket creation and cross-instance logins
- Creating an incident now takes only few seconds, compared to 5 minutes previously, with no need to update the

discussion between case and incident in different instances

- Operational efficiency improved by ~40%, with agents managing tickets from a single system of record and less context switching across 2–3 instances per transaction

*“Before Service Bridge, to create an incident it used to take 5 minutes; now it just takes a few seconds. We also save time without needing to update the discussion and process between case and incident in different instances.”*

— Aon stakeholder

### Service levels and productivity

- SLA adherence gained ~25–30% efficiency through automated bi-directional updates, quicker acknowledgment, and reduced handoff delays
- Agent productivity improved by ~15–20% by reducing logins to multiple systems to inspect cases

### Transparency and visibility

- Process observability increased by ~60% by providing real-time ticket status visibility and updates across instances
- Manual follow-ups and email-based status checks eliminated
- Greater transparency into what is happening between case and incident across the two instances

*“More transparent on what’s happening between case and incident in two different instances after the integration.”*

— Aon stakeholder

### Platform health and scalability

- Technical debt significantly reduced, enabling faster upgrades and scalability
- A scalable, compliant solution that eliminated manual

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work and supports multi-account, cross-instance integration

Aon also reported qualitative gains: an enhanced customer experience through omnichannel support and self-service portals, improved collaboration between IT and customer service teams, and stronger governance and visibility across global operations.

*“Overall, the Service Bridge Go Live has gone well and has enabled greater efficiencies for the team. The integration has streamlined support processes, which is a positive outcome!”*

— Aon stakeholder

## From manual escalation to **connected service operations**

Where the process previously depended on manual interventions, automated workflows and Service Bridge now enable real-time cross-instance updates between CSM and ITSM

The integration positioned Aon as a leader in connected service ecosystems.

## About the engagement

Looking to make your Service Bridge implementation work harder in your environment? Connect with INRY to learn how

how Service Bridge can connect your CSM and ITSM operations.