

Insurance Market Management (IMM)

Make insurance sales easy. In the current climate insurers need to join up broker, aggregator and direct channels. This will help maximise revenue, renewals and cross-selling opportunities, and minimise customer churn, ensuring they remain ‘at the table’ rather than ‘on the table’.

Insurance organisations need to maintain visibility and control across a complex array of sales channels, utilising multiple technologies. Sales and marketing platforms need to empower and enable partners and direct sales alike. They also need to work with existing technologies, whilst easily enabling the new.



We have utilised Microsoft Dynamics and accompanying technologies to create a ready-made template solution for insurance organisations called Insurance Market Management (IMM). This pre-configured Microsoft Dynamics solution delivers the following processes out of the box;

- Customer and contact creation
- Account enquiries, i.e. receiving requests via financial advisors
- Opportunity management
- Proposal and quotation management
- Underwriting assessment
- Document management
- Pipeline management and renewals management
- Cross-selling
- Communication with customer, i.e. product or regulatory changes

WHY CGI

- Exceptionally strong track record in the insurance industry
- Work with 8 of the top 10 global insurers
- Work with 7 out of the top 10 UK insurers
- More than 160 insurance clients worldwide
- Transformation program management expertise across the insurance value chain
- The only Microsoft partner delivering a pre-configured solution for the Insurance sector in the UK
- Best-in-class IP-based proprietary software solutions for Rating Underwriting, Policy Administration, Claims Management and Fraud Detection
- A Microsoft Gold Partner with 800+ Dynamics consultants including 400+ AX, 200+ CRM
- Our capability extends across the entire Microsoft spectrum of products

It also includes:

- Pre-built Integration with MS SharePoint for Document Management
- Pre-built Integration with MS Outlook providing a familiar user interface
- Pre-built Integration for back office systems for example Rating, Accounts, Claims Mgt
- Easy integration with CGI's Microsoft based Insurance Management Information solution, Insurance Information Unlocked (IIU)
- A portfolio of project accelerators, i.e. documentation and load programs

The IMM Template solution will:

- Improve visibility and control of all customers across all channels improving group-wide governance and control
- Enable better management of relationships across all channels in the end-to-end insurance value chain
- Reduced revenue leakage
- Improve efficiency & effectiveness (e.g. reduce errors, avoidable queries and re-work)
- Allow efficient expansion into new, more lucrative markets
- Improve customer experience
- Increase speed to market for new offers
- Re-use existing Microsoft skills, tools and licenses
- Improve transparency & decision support through better MI and Analytics, i.e. on leakage, operational statistics, customer profitability, risk

Mobile solutions are now a key factor to increasing your productivity, improving your service access and building customer loyalty. Delighting your brokers and customers with a fast responsive mobile access will improve sales for all. Windows 8 touch-screen surface devices can be added to the IMM to provide this access.

OUR APPROACH

The template approach, utilising CGI's IMM template solution allows a very clearly defined implementation scope. It can work in conjunction with Agile or Waterfall implementation approaches. This allows for:

- Low cost entry point
- Quick implementation
- Greater ease of implementation
- Quicker time to benefit

Founded in 1976, CGI is a global IT and business process services provider delivering high-quality business consulting, systems integration and managed services. With 68,000 professionals in 40 countries, CGI has an industry-leading track record of delivering 95% of projects on-time and on-budget, aligning our teams with clients' business strategies to achieve top-to-bottom line results.

WHY MICROSOFT DYNAMICS

- With Dynamics CRM, Microsoft provides an agile solution that integrates easily with other existing applications.
- Provides state of the art mobile surface device based user interface
- It leverages other Microsoft solutions by integrating seamlessly with Outlook, SharePoint, Office and Lync to provide a truly collaborative platform
- Forrester Research in 2011, found that companies implementing Microsoft Dynamics CRM 2011 achieved a 243% return on investment
- Low total cost of ownership and the pervasive nature of Microsoft technologies

WHY THE IMM TEMPLATE

- Achieves highly desirable strategic business outcome
- Achieves in-year ROI
- Allows faster, lower cost project delivery and transition
- Savings improve internal business case
- Simplifies the technical project
- Allows CGI to be highly confident in delivering rich functionality in short timescales
- Ensures best practice relevant to the insurance sector
- Enables a highly effective transfer of prior CGI experience

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