

Case Study



R3: Affinity Alliance Director, Rob Proudman, reveals how Orbis has benefited reporting for insurance policy administration.

Leading UK based affinity alliance company implements Orbis to automate a number of manual processes, helping to reduce costs and increase information visibility to their Business Partners.

Customer Profile

Name	R3: Affinity Alliance Limited
Country	UK
Industry	Insurance
Employees	60
Web address	www.r3group.com



Reseller Profile

Name	DPStelecoms.NET
Contact	James Hart
Web Address	www.dpstelecoms.net



Background

R3: recently acquired SHIB (Stuart Harvey Insurance Brokers) and were looking to increase the size of a number of the insurance books that they currently run. One of these books is an existing Household account which is underwritten by Avon Insurance and currently has approximately 1,000 policy records which are manually serviced and maintained by SHIB in their offices in Hook.

A new Policy Administration System was implemented at R3: to handle the existing SHIB business and the growth for which is planned in this area. Due to the high volumes of data that would be stored within the system and the amount of transactions that would need to be carried out on this data, the system was based on an SQL Server environment. A key element to the new system was the need for accurate, timely and pre-calculated information to be sent to multiple recipients for the purposes of management information and auditing.

Requirements

Their primary requirements were that they needed some form of automated reporting without any manual intervention being required and be able to integrate the chosen solution into a familiar environment, where the users will be able to interpret and use the data without the need for any further querying or processing.

Example - Bordereaux Report to Avon

This report is to be generated on the first day of the month and again on the last day of the month. The report will select all policies (both New Business and Renewal) that have a Cover Commencement Date set to a date within the previous calendar month (e.g. on February 1st the report should contain all policies with a Cover Commencement date of between January 1st and January 31st).

Solution

Orbis Intellware was chosen as the ideal platform to meet the intensive reporting requirements of the SHIB Policy Administration System and through the utilisation of SQL based queries; the timely delivery of email alerts direct to the users inbox would be achieved.

Implementation

The main element of the implementation was the production and configuration of Orbis Alerts. Profiles, another very powerful tool within ORBIS were not used in this project; however there is the possibility that these may be implemented in the future as new requirements of the SHIB system arises.

The Alerts feature in its own right offered a comprehensive solution in solving the reporting requirements for this project, but in particular it was the ability to create formula fields that proved to be vital for ensuring the end users received all that data that was required even if the data was not originally stored in the underlying database.

One example of this was in the implementation of the Bordereaux Report to Avon where the field "Monthly Premium Payable to Avon" was required to be calculated from a range of currency fields, however the formula field had to determine what type of policy each record was and apply the correct calculation accordingly. Avon now receive an automated email each month detailing all the information they require to carryout their auditing, commission and reconciliation tasks, which has made the process more efficient and timely than its manual alternative.

This workflow is just one example of the Alert based functionality of Orbis Intellware and the functionality it will provide.

"Accurate and timely management information is vital to the success of our business. It builds trust with our business partners and allows us to grow our business at a faster pace. Orbis has been crucial to the efficient production and distribution of information.

Rob Proudman

Director