



Pivotal Implementation Services: International Insurance Major

Overview of Client Operations

An international insurance major was interested in strengthening the foundations of their business, renewing their product portfolio, developing their distribution network and improving their operating efficiency for their Japan operations. Their existing system was mostly manual in nature. The company needed a vendor who could create a complete policy administration management system capable of interfacing with applications working on various platforms and also conduct periodic enhancements to the system as per need.

Key Challenges

- Handling credit card, direct debit, cash and bank transfer payments for the premiums charged for policies
- Creating an audit log for changes to policies, contacts and other information
- Handling commission calculations for direct marketing agencies
- Creating complex reports involving vast amounts of data for the Actuary, Accounts and other departments
- Creating a user-friendly system capable of allowing end-users to configure and add new products easily without any programming
- Creating a bi-lingual user interface (Japanese and English)

Customization Done by GrapeCity

GrapeCity provided a system based on the Pivotal framework to handle the policy administration process. This consisted of:

- Basic System - Direct Marketing. Some important features:
 - Policy upload for telemarketing company
 - Benefits and premium calculation
 - Underwriting checks
 - Application validation and activation
 - Billing - credit card billing and tracking of payments
 - Cancellation, lapsation, re-instatement of policies
 - Registration and tracking of claims
 - Calculation of commission and other policy administration functionalities
- Enhanced System that is more versatile. Some important features:
 - Addition of traditional agent/agency channel over and above the direct marketing channel
 - Addition of new products for life insurance
 - Ability to handle general insurance
 - Additional reports for agents and agencies
 - Addition of cash, demand draft and bank transfer payment methods
 - Increase in number of authorized credit card banks
 - Actuary Reporting
 - Financial Reporting
 - Interfaces to other existing SFA systems

Benefits to the Client

- The availability of online information to customer service staff helps them serve clients better, thus ensuring better retention of clients.
- Report generation enables them to analyze data, leading to improvement in the quality of their products and services.
- The flexible solution allows quicker adaption to the changing needs of the client, resulting in faster time-to-market for new products, thereby leading to increased profitability.
- The timely resolution of customer complaints leads to customer satisfaction and retention for the client.
- A single-access point for the top management to view data reduces time spent by them to analyze data, enabling them to focus on key issues

GrapeCity India CRM Expertise

GrapeCity has extensive expertise in working with Pivotal partners and clients around the world - in Japan, Singapore, Australia, U.A.E., U.K., Indonesia, Europe, India, China, Taiwan, and the United States. Our consultants are trained on the latest Pivotal products. We have comprehensive experience in implementing Pivotal CRM projects and integrating Pivotal CRM with other software. We have also implemented SalesLogix, Microsoft CRM and customized CRM solutions.

Best Practices

Our implementation is based on Pivotal's Rapid Productivity Methodology (RPM). We augment RPM with our own best practices based on our experiences in helping manage client communications, expectations, decision-making and schedules. Our best practices include:

- Capturing client requirements - we gain a thorough understanding of the business goals of your organization. This way we often end up with a better understanding about client requirements.
- Documenting current processes and requirements so that the client can ratify our perceptions.
- Helping you define new processes that would re-orient you towards success.
- Helping you prioritize requirements so that you are better geared towards an early success.
- Providing implementation, development, customization, integration, testing, training and support services.
- Auditing - we audit your CRM system to make sure you are obtaining the maximum value you can.

GrapeCity Overview

GrapeCity has over 20 years of experience in quality software development. During the past seven years, GrapeCity has developed and provided CRM implementations and services. GrapeCity has offices in Japan, China, India, Mongolia and the USA, and services clients in many other locations throughout the world. GrapeCity brings to enterprises around the world the benefits of the latest technologies by providing optimized software solutions and services. Our areas of competence include custom application development, technical support, software components, and business solution expertise in areas such as Customer Relationship Management (CRM), Enterprise Resource Planning (ERP), School Management and Financial Accounting. We are Microsoft Gold Certified Partners and we have extensive expertise in bringing the benefits of Microsoft's latest .NET range of products to our clients.



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