

## IVORY CASE STUDY



Full service insurance carrier improves customer experience and sells policies faster with the help of GT Software.

A successful U.S. based insurance carrier that provides a wide variety of insurance coverage, including life, property and automobile, credits its success, in part to a reputation for providing superior customer service. Together, with its affiliates, the carrier has more than one million customers across the country, one million plus property and casualty policies, and over \$27 billion worth of life insurance policies in force.

Daily, agents are visiting clients and preparing insurance quotes on site. To ensure the highest level of customer service and satisfaction, the insurer is committed to offering its prospects and clients a personal face-to-face experience along with fast, accurate quotes.

Unfortunately, due to the lack of real-time data access to the mainframe-based insurance rating system, generating accurate quotes was a struggle for the agents.

### CHALLENGE

#### Providing prospects with accurate quotes onsite

Historically agents provided an approximate quote/estimate in the field based on data in a macro-enabled spreadsheet that was not updated in real-time. Once they returned to the office, they compiled a more accurate quote taking into account the up-to-date rate changes and eligible customer discounts. This quote/estimate information was also hosted on the mainframe-based insurance rating system.

The inability to acquire this information in real-time while in the field, caused a delay in providing prospects with a definitive, detailed estimate. Unfortunately, this could be interpreted as the representatives being inattentive or misinformed. This resulted in disappointed, frustrated customers.

To improve productivity and enhance the agents' level of customer service, the company needed to provide real-time access to data stored on the mainframe, from any location. Generating the correct quote in the field, enabled immediate approval of the final quote, thus reducing lost business due to delayed quotes.

### CLIENT

Full Service Insurance Carrier

### INDUSTRY

Insurance

### HQ

United States

### CHALLENGE

Needed to provide a mobile solution for agents to generate accurate, real-time insurance quotes in the field

### SOLUTIONS

GT Software's Mobile Enablement Solution  
GT Software's Ivory® Service Architect™

“ We are committed to offering top-tier customer service, and have suffered in this area because we could not access our data in real-time in the field. ”

-Project Lead

## SOLUTIONS

### Web services mobilize the mainframe and empower agents

The insurer knew that the best way to solve the problem of faulty, inaccurate quotes was through mobile access to the mainframe. By enabling the mainframe-based rating system to work with mobile devices, insurance agents would have the power to access the real-time data they needed in the field. They chose GT Software's Mobile Enablement Solution, featuring Ivory® Service Architect™.

With Ivory Service Architect, the insurer's development team easily built Web services for mainframe access from the field via laptops, mobile devices, and tablets. With its easy-to-use graphical interface with drag-and-drop capabilities, it was simple for developers to quickly create Web services, greatly reducing the time and steps required in generating each quote.

### Synchronicity success

In addition, applying rate changes to the primary insurance rating system is now easier with Ivory Service Architect. Before, the rate changes would have to be applied separately to the mainframe, the macro-enabled spreadsheet, and the customer facing website. But, now, the rate changes need only be updated on the mainframe, and are easily accessed in real-time by mobile devices in the field.

The insurer has also found success in using Ivory Service Architect to improve internal business operations. Managers now have new applications that they can use to make "self service requests" and to approve changes in agent commissions. They can even track sales, and determine recipients for rewards or sales incentives. These new applications have enabled the managers to accomplish this part of their job faster than before, giving them a boost in productivity.

## RESULTS

### Streamlined business processes and increased customer satisfaction

With Mobile Enablement via Ivory Service Architect, insurance agents can now quickly and easily create real-time, accurate insurance quotes for customers faster than ever before. Both agents and managers have seen positive results:

- Agents can access the insurance rating system anywhere with laptops, mobile devices, and tablets
- Customers can approve quotes on site immediately
- Substantial boost in productivity and customer service
- Internal employees have created applications to streamline and boost performance

By providing access to the rating system and real-time data in the field, agents have increased the level of customer service they provide. Additionally they close more sales, faster, as prospects now accept and approve final quotes on site. Plus, the insurer now easily builds applications that empower managers and other personnel, streamlining business processes that improve efficiency and effectiveness.



**Real-time access with laptops, mobile, tablets**



**Improved productivity and customer service**



**Shorter sales cycle with onsite approvals**



**Streamlined internal business processes**

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“The capability to create new applications to benefit our workforce has been an unexpected, and welcomed benefit of GT Software's Ivory Service Architect. Because the tool is so easy for our developers, creating new applications to help managers and agents thrive has been a great boon for our organization.”

-Project Lead