

Dedicated Customer Service Web Portal

Edgewater partners with organization to document current systems and procedures as well as develop a Web Strategy for Producer and Customer Service.

Edgewater's Insurance consultants:

- Documented current systems and procedures;
- Developed Web strategy for Producer & Customer Service;
- Streamlined engineering life cycle while ensuring critical activities were performed;
- Designed new workflows capitalizing on best practices;
- Introduced Business Intelligence so future functionality can be determined and provided the ability to measure specific activity in a certain area and leverage the information to make better management decisions.

The Challenges:

As a leader in the payroll deduction and voluntary insurance sales marketplace, this organization's products and services, including life, accident and supplemental health insurance, offer financial security for employees, enhance benefits programs for employers and provide a competitive edge for producers.

They wanted to improve their Website and optimize Customer Service areas by providing Web portals to three distinct user communities: (1) Producers, (2) Employers and (3) Customers. They requested Edgewater Technology identify opportunities where service to their customers and producers could be improved by streamlining operational efficiencies reducing the amount of manual processing by the Customer Service team. This included leveraging web-based applications and self-servicing capabilities via the Web.

The organization wanted to provide Producers with access to a "Producer View Website". This dedicated Website would provide agents with a personalized view into the offerings, online forms, product information, and services specific to their role. In addition, it would enhance the turnaround time for routine policy transactions.

They also planned on providing an Employer View portal enabling employers to view bills, access policy values and information, and reconcile employee census information online. With this capability, employers would benefit with more accurate and timely billing reconciliation, sorting and status. Other offerings on the Employer View portal would be a pay-

roll calendar, selection of notification preferences and census information.

The organization also wanted to provide customers with a specific view. This would empower customers with web-based self-service capabilities that would address more routine service questions and general transactions. In addition, customers could access standard forms, apply simple policy changes and participate in electronic enrollment.

The Solutions:

Edgewater partnered with this organization to document their current systems and procedures, and develop a Web Strategy for Producer and Customer Service. The process included reviewing the organization's current Web presence as well as current Customer Service and billing processes. Each potential Website enhancement was assessed based on its overall fit to the Website strategy, impact on Customer Service processing and potential for cost savings.

Edgewater applied a software engineering process that combined the rigor of classic development methodologies with the flexibility of leading-edge Website development techniques. This process consisted of several phases that progressively advance the project from the initial planning stages through design, development, testing, and deployment. Underlying the entire process was a foundation of quality assurance checks and balances, and thorough, yet streamlined project management procedures. Rather than prescribing a rigid engineering approach, the phases of this process acted as the building blocks to construct an engineering life cycle tailored to the specific needs of the organization's project requirements. This enabled Edgewater to streamline the engineering life cycle while ensuring critical activities were performed.

As part of Edgewater's analysis on this project, new workflows were designed, capitalizing on best practices with the existing processes to demonstrate how the Website functionality would be incorporated and enhance the organization's existing operations.

In addition to the Website business and technical analysis, Edgewater introduced Business Intelligence (BI) as a means of determining future functionality to implement. By leveraging BI tools, the organization could measure specific activity in a certain area and utilize the information to make better management decisions.