

Renew Insurance Automates Business Processes with Reflection Software



Renew Insurance specializes in providing high-quality, low-cost home, car, van, and motorcycle insurance. Based in Newmarket, Suffolk, the company offers a wide range of insurance policies from a large panel of expert insurers. They also offer numerous financial products via major service providers. Seventy employees serve the requirements of more than 60,000 customers. In June 2009, Renew Insurance was acquired by Hastings Direct, a UK-based insurance provider with more than 400,000 customers.

Like other insurance providers who process large volumes of data on a daily basis, Renew Insurance wanted to be able to respond quickly and accurately to customer needs. More specifically, they wanted to reduce the time employees spent on day-to-day administrative tasks. And they wanted to speed up legacy data access and report generation.

To meet these objectives, Renew Insurance began looking for a terminal emulation solution that could seamlessly integrate their critical IT systems with their front-end desktop applications.

Reflection Software: The Right Fit

The company's core IT systems are supported by a three-person team, headed by Derek Roberts, Systems Director for Renew Insurance. The team ensures that systems operate at their optimum efficiency and that issues are dealt with quickly to minimize business disruption.

Renew Insurance founded their business on software supplied by Cheshire Data Systems Ltd. (www.cdl.co.uk), an industry-leading insurance software provider. The CDL "Classic" system is a long-established, terminal-based system. Roberts's goal was to find a terminal emulation solution that could successfully integrate with this core sales platform and improve user productivity in the process. He found what he was looking for, and more, in Reflection® for UNIX and OpenVMS 2008.

Reflection for UNIX and OpenVMS software supports a variety of operating environments and delivers the flexibility needed to manage IT complexity. This next-generation terminal emulator supports Windows 7, Windows Vista, diverse security architectures, and virtualization technologies. Based on Microsoft .NET and integrated with VBA, Reflection delivers complete customization freedom.

"I have used several terminal emulation solutions in the past, but none of them had the flexibility and ease of programming that Reflection offers,"

QUICK VIEW

Problem

Renew Insurance needed to integrate its legacy host data with front-end desktop applications and reduce the time spent on repetitive administrative tasks.

Solution

Attachmate Reflection for UNIX and OpenVMS terminal emulation.

Results

- Improved user productivity.
- More efficient processing of insurance policies.
- Substantial improvements in accuracy.

Roberts said. "We have a number of repetitive processes—for example, policy confirmation and end-of-day report generation—that drain on our resources. Using Reflection, we automated those processes quickly and easily, which has improved staff productivity and data-entry accuracy."

More Time for Customers

According to Roberts, setting up the necessary scripts to automate repetitive tasks could not have been faster or easier. Reflection establishes scripts based on the replication of keystrokes required to complete an action. "With Reflection, time-consuming actions can be completed much faster and more accurately," he said. "Employees have more time to focus on strategic tasks and business development."

Reflection's scripting capabilities have streamlined three key tasks:

• Processing of insurance policies

In the past, two full-time employees had to manually check a customer's financial records before a policy could be confirmed. Today, these checks can be performed by Reflection. Reflection can read what is on the screen, make a logical decision, and act upon it. For example, a process might involve taking a case to be processed for policy issue, and navigating to the diary screen. The script process would then scan down the screen, looking at the input and action dates of the diary, and seeing whether the diary had been closed off (in which case the policy would be processed) or was still

open (in which case, the case would be flagged for further action as there is something still outstanding on the record.) If there is a discrepancy—e.g., something doesn't correspond with the script—then it is highlighted and transferred to one of the account handlers for resolution. The result is that Renew employees are able to handle more policies per head than the industry average – an estimated improvement in efficiency of 20 percent or more.

- **Production of daily reports, such as cash sheets and financial summaries**

In the past, employees had to spend valuable time running off daily reports. Today, Reflection scripts, which run in the background after hours, produce reports that can be stored in a folder, ready to be analyzed the next morning. The scripts can also produce summary reports, consistently formatted, for external suppliers.

- **Creation of monthly Bordereaux reports**

In the past, Renew employees had to manually produce monthly Bordereaux reports of written risks and collected insurance premiums—a tedious process that was highly susceptible to human error. Today, with Reflection scripts, these reports can be created within a couple of hours instead of a couple of days.

“The bottom line is that Renew Insurance needs fewer accounts staff than comparable organizations,” Roberts said. “And that means they are able to concentrate more on serving our customers needs.”

Distinguishing Between “Branches”

Renew Insurance operates several brands, each with discrete data sets, that need to be kept separate from each other. The company accomplished this separation setting up different system “branches,” which operators select and log into as required.

The problem was that the menu screens of the various branches were identical, making it difficult for operators to distinguish between them. To ensure that operators don't waste time searching for a client in the wrong area, Renew used Reflection to color code the operator screens. The new system

simplifies navigation and improves operator accuracy.

Renew also used Reflection to automate the process of switching back and forth between branches. Now, rather than having to re-enter their log in details whenever they move between branches, the operator just clicks the mouse—a big boost to productivity.

One area traditionally prone to error has been the accurate recording of source codes, as operators may choose to ignore information supplied by the phone and input a code that allows them to proceed to the quote quickly. Using Reflection, Renew Insurance developed a macro that automates the process. The macro ensures that the correct source codes are entered automatically, using information supplied by the phone system. What's more, the operator is prevented from amending it until the process is complete.

Automating this process has resulted in the improved accuracy of inputted data. It also enables Renew to have confidence in the captured data, and to apply the marketing budget more effectively based on the results.

Moving Forward with Reflection

As Renew Insurance's business continues to grow, the company will continue to rely on Reflection software to help streamline their IT processes. According to Roberts, “One of the reasons Hastings Direct acquired us was because of our IT efficiencies. We are now looking to roll out the Reflection solution throughout their call centres, to help bring them up to the same level of efficiency that we have reached.”

Renew Insurance is also in the process of developing an application with .Net that uses Reflection to link to the telephone system. As a result, customer and campaign information will appear on the screen when a connection to the customer has been made, further improving staff efficiency.

Looking forward, Renew Insurance can explore other avenues of development using the performance or reliability of Reflection. Derek Roberts concludes: “Reflections has been a key element in the success of Renew, and we look to further unlock its potential moving forward”.

About Attachmate

Attachmate delivers advanced software for terminal emulation, application integration, and secure communications. Our NetIQ business provides solutions for automating IT processes and managing performance, security, and compliance of distributed IT. With our technologies, more than 65,000 businesses worldwide are putting their IT assets to work in new and meaningful ways. www.attachmate.com



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