

" Web Based Customer Portal built on Microsoft .Net 3.5 platform, helps Insurance Industry Giant with Customer Retention and Brand Management. "

Client

Insurance

Environment

IBM LDAP
IBM HEAT
IBM CMS
Oracle Database
SQL Database

Technology Used

Microsoft .NET 3.5 development platform
WCF (Windows Communication Foundation)



Business Needs

To remain one of the fastest growing insurance companies, despite increasing competition and a changing market, the client seeks to deliver the broadest product portfolio and highest standards of customer service and so needed a high performance customer portal that would increase customer loyalty and retention. The client had several disparate legacy systems and faced significant issues with respect to efficiency and customer service. While an overall lack of integration created reconciliation challenges, the introduction of new products was also time consuming and this severely impacted market competitiveness for them.

They needed a comprehensive, web based solution to accelerate operational processes. This solution also needed to be easily accessible throughout the organization.

Solution

Fulcrum Logic conducted an in-depth requirement analysis with client and identified key service areas to be incorporated into the portal. These were:

- Customer Registration
- Policy Registration
- Proposals
- Policies
- Servicing Requests
- Online Payments

Fulcrum's proven delivery capability and strong commitment to leverage the right skills in the right place at the right time and cost resulted in a highly successful collaborative effort with the client team. While combatting aggressive timelines, Fulcrum mobilized a committed team structure comprising business, technical and subject matter experts to navigate cross-project integration issues. Based on the latest Microsoft .Net 3.5 framework and with a multi-box deployment in a Windows 2008 environment, Fulcrum developed the portal to integrate with legacy IBM systems and provided on hand visibility for the insurance agents to track service requests posted by customers and follow up on them. The portal was

Brief History

The Client is a leading financial conglomerate, offering complete financial solutions that encompass every sphere of life. From commercial banking, to stock broking, to mutual funds, to life insurance, to investment banking, the group caters to the financial needs of individuals and corporate clients alike.

The group has a net worth of over 1.4 billion USD, employs around 20,000 people in its various businesses and has a distribution network of branches, franchisees, representative offices and satellite offices across 370 cities and towns in India and offices in New York, London, San Francisco, Dubai, Mauritius and Singapore. The Group services around 4.4 million customer accounts.

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Solution

built to encompass the first phase of policy administration and included a payment gateway for online transactions, as well as email and SMS gateways for instant alerts. As the use of "selective" outsourcing grows, customers have found themselves needing to manage multiple vendors that provide different services in different ways, all of which require a high level of co-ordination. Fulcrum executed this project along with Microsoft and complemented a vendor that provided business consultancy in the insurance domain.

Benefits:

- Creation of an effective Point-of-Sales portal that gave the customer the opportunity to decide between various financial products, send service requests, view history, make payments and connect with the client in a personalized and rapid manner.
- Outreach to a larger targeted customer pool all over India which would help create a strong brand identity and visibility for the client in the minds of its current as well as potential customers.
- The design facilitates integration with other business applications which was key to reducing operational costs related to streamlining manual service requests.
- The customer gained easy accessibility to the portal through personalization and higher responsiveness to requests.
- The project has impacted key areas for the client such as efficiency in the policy administration process and cycle time compression for sales operations.

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