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## CUSTOM SOFTWARE SOLUTIONS

# TBW achieves total integration

With the most recent commercial product releases from Custom Software Solutions Inc. (CSSI), The Broker's Workstation (TBW) has become the only fully integrated management system available to insurance brokers in Canada, according to Jacy Whyte, VP marketing.



Whyte

It's a combination of insurance experience and technological expertise that enables CSSI to provide end-to-end information technology solutions to

over 350 brokerage offices, he says.

For brokers, CSSI's TBW, with its back office Broker Management Accounting system, the rating system called Intelliquote, its company integration tools and new commercial system, has proven to be a solid workhorse since it was introduced in the mid-1990s.

The Broker Management Accounting module provides all the necessary accounting tools to manage a brokerage and is tightly integrated with all other CSSI-developed modules and functions. It includes:

- **Comprehensive tools to manage brokerage accounts payable and accounts receivable**, including reports, payment bordereaux generation, reconciliation tools, statements and bulk service charges;
- **A customer relationship management tool**, including client folder details and management, easy attachment of all file types to client files (MS Word, MS Excel, PDF, JPEG etc.), fully integrated word processing, fully integrated e-mail, abeyances and activities, scanning capabilities, claims reporting and management, list folders/group folder capabilities;
- **Quick pay** feature makes writing cheques fast and easy;
- **Customize and design reports** specific to your operation;
- **Utilize predefined reports**, including expiry lists, production report, policies in force and bordereaux report;
- **Combined one-time entry** policy

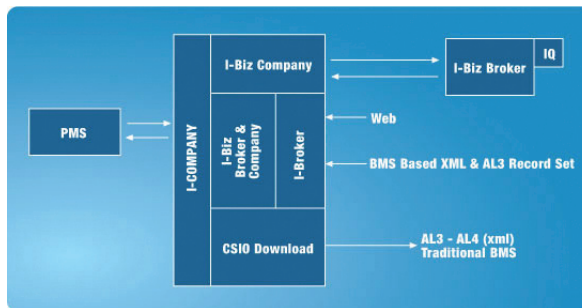
transactions (I-Biz, CSIO or manual entry), including commission splits and policy fees, MGA billing, subscription policies, user-defined commission rules for companies, sub brokers and producers;

- **No month-end or year-end closing delays** – daily transaction entry can continue without interruption;
- **Multi-branch capability**. Multi-agency, branch and department reporting capability allowing financial reporting on a single branch, single agency or consolidated basis;

participating carrier;

- **Web connect single-click sign-on:** access a wide range of insurance company and service bureau websites. CSSI's first commercial product was added as a module to TBW (also available as a stand-alone product). A new product called The Underwriter's Workstation (TUW) targeted at MGAs was launched a few months later. "We really believe our commercial release rounded out our offering," Whyte said.

CSSI began development of a **commercial lines management module for both brokers and insurers/MGAs** after many broker clients advised the firm of the need for a commercial product built by brokers for brokers. Not only was there a requirement for a solution integrated into the current management system, but also for a solution that went beyond what was currently



**CSSI has produced the only fully integrated management system available to brokers and insurers in Canada.**

- **Payment plan capabilities** – EFT, post-dated cheques;
- **Customize security and access** to control and protect the privacy of accounting data and ensure that transactions are recorded by authorized staff only. The Intelliquote module can operate and is available as a stand-alone product as well as integrated as part of the complete solution. It includes:
  - **A customer relationship management tool;**
  - **A fully integrated rating and underwriting tool**, including hab, personal/commercial auto and agro rating and underwriting, flash quote capabilities, over 1,800 company/region/line rate manuals supported;
  - **Fully integrated home-evaluation tool.** Company integration tools include:
    - **I-Biz company integration and communication tools:** electronically exchange application/endorsement risk data between the broker and the

available in the marketplace. CSSI has worked with participating brokers from across Canada to develop a solution that exceeds current solutions and fulfills broker and insurer/MGA needs for today's commercial insurance requirements.

An overview of the broker commercial product and TUW highlights are:

- **Intelliquote (IQ) style data collection for multiple company rating**, including referral rating, rateable commercial;
- **CSIO quote sheets and application sheets built in;**
- **Policy number management;**
- **Renewal manager** – only one click required to renew a whole book of business;
- **Fully customizable bordereaux reporting;**
- **Customizable work** for rating definitions (customize data collection), quote sheets and dec pages;
- **A customer relationship management tool, including fully integrated accounting system and personal**

**lines rating tool available;****▪ Available as a stand-alone product.**

“With the launch of the commercial product we can safely say there is no other software vendor in Canada that provides all the functionality a broker requires to operate efficiently in one integrated management system,” said Whyte. “The MGA product was developed in

consultation with a handful of MGAs and really fills a need in that market.”

The next enhancement to TBW and TUW is I-Client. Custom Software Solutions is focusing its development efforts on this soon-to-be launched module that will allow brokerages to significantly expand their ability to provide client access to their services online, including quoting

and prospecting, insurance purchase, access to client policies, account balances and other documents and client access for self-serve transactions, including change requests, payments and cancellations.

“We view the online marketplace as a next step for brokers and a logical next step for their automation systems to accommodate,” Whyte said. **IW**