



NEWS RELEASE

“Game-changer”: SGI CANADA and CSSI Pilot Real-Time Data Exchange for Policy Change Requests

Regina, SK and Virden, MB – June 18, 2020 – SGI CANADA and Custom Software Solutions Inc. (CSSI) are pleased to announce they are piloting the first real-time, personal lines policy change request transaction in Canada, starting and ending in the broker management system (BMS).

The process connects CSSI’s broker management system, The Broker’s Workstation, rating service IntelliQuote (IQ) and SGI CANADA’s policy management system, transferring data between the systems in real time using CSSI’s I-Company carrier integration product. It allows brokers working with SGI CANADA to underwrite, rate and submit a policy change in real time from their broker management system to the insurer. If accepted, a revised policy will be returned in real time, including the eDocs policy document.

“This is a game-changer,” said SGI CANADA’s Chief Digital and Information Officer Dawn Bloom. “By giving brokers the ability to make changes to our personal property policies within their own BMS, we’re making it easier for them to do business with us and improve the customer experience overall.”

“We know brokers have been asking for the ability to transact business with insurers through their own broker management systems for many years, and SGI CANADA is proud to be among the first insurers in Canada to step up to provide the solution,” she continued. “It’s vital for the entire industry to get on board with the development of application program interfaces that can seamlessly integrate these systems.”

This pilot is the most recent phase in an overall project that includes quote, new business, policy change, cancellation and renewal transactions in real time, with not only The Broker’s Workstation, but also Keal Technology’s SIG platform and other industry BMS solutions, all starting and ending in the BMS. The solution is designed to adhere to the Insurance Brokers Association of Canada real-time data exchange principles using CSIO standards and will be deployed to all regions where SGI CANADA operates. This latest phase builds on the integrated rating and real-time new business submission and issuance announced last year.

“We’re excited to be piloting the first standards based, real-time policy change transaction process of its kind in Canada,” said Brock Andrew, COO of CSSI. “We have 20 years of experience working on real-time transactions including policy change and to see it working with a broker committed partner such as SGI CANADA utilizing our I-Company solution is rewarding. Automating the change request workflow opens the door for incredible efficiency gains for both

the broker and carrier and can deliver enhanced customer service our distribution model requires.”

About SGI CANADA

SGI CANADA is the property and casualty insurance division of SGI, offering products in five Canadian provinces. It operates as SGI CANADA in Saskatchewan, British Columbia, Alberta, Manitoba, and Ontario, and also as Coachman Insurance Company in Ontario. Products are sold through a network of independent insurance brokers.

About Custom Software Solutions

Custom Software Solutions Inc. (CSSI) is a leader in real-time digital solutions and business process automation systems for insurance brokers, companies and MGAs in Canada. Our proven broker and MGA products are The Broker’s Workstation (TBW), IntelliQuote, I-Client and The Underwriter’s Workstation (TUW). Our insurance company products are I-Company, I-Broker and I-Biz. Together, they are increasing productivity and decreasing operating expenses for both brokers and companies. The CSSI team includes insurance industry professionals and computer technologists and programmers. For more information, visit our website at www.cssionline.com.

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