



Company Profile

Company Name: Alan Boswell Group

Number of Staff: 100 general insurance staff, 30 financial services staff

Company Contact: Richard Hartley, IT Manager

Business Focus: Leading regional commercial broker best known for property and affinity schemes.

(Listed in Insurance Age top 30 independent brokers)

Locations: Norwich & Attleborough

Date Founded: 1982

The Issue: To automate affinity schemes, improve operational efficiency and extend overall web trading capability.

Alan Boswell Group and Open GI

Years with Open GI: 20+

Open GI Solution: Open GI Linux platform, e-Quotes, X-Stream, Advanced Prospect Management (APM), Regulation Module, Open-R, OpenWord, Scheme Toolkit, Scheme Manager, InfoCentre.

Alan Boswell's Objectives:

With over 20 years in business, 100 general insurance staff, and a wide ranging commercial property and affinity schemes portfolio, Alan Boswell Group has a strong market presence – one which it wishes to continue to expand.

Technology is at the heart of its expansion plans and is one of the reasons why Alan Boswell has invested heavily in its Open GI system in recent years.

According to Richard Hartley, who heads up Alan Boswell's IT Division, one of the main factors behind their decision to commit to the Open GI platform is the number of new solutions available to brokers.

Open GI Solutions:

Alan Boswell uses a range of Open GI solutions. This includes software to cater for schemes (Scheme Toolkit and Scheme Manager), an end-to-end e-commerce solution (e-Quotes and X-Stream), a Microsoft® SQL database for seamless reporting (InfoCentre) and commercial registers solution (Open-R).

In addition, Alan Boswell has contracted for Open GI's newly launched browser based desktop interface, Open-i. This will be used by all staff.

There are currently over 100 users of the Open GI system within the Group – a figure which continues to expand. In order to maximise processing capacity, the Group has upgraded to Open GI's new Linux based server platform.

Commercial scheme automation:

In order to replicate the efficiencies of open market trading, Alan Boswell has built a number of schemes within the Open GI system using a combination of Scheme Toolkit and Scheme Manager. The software introduces automated scheme rating calculations and enhances sales workflow.

According to Richard Hartley, scheme automation is a key priority. He said: "Using Scheme Toolkit we can create and amend risk capture according to our unique requirements so that the user is navigated through the system. This is useful for our Property Owner's scheme where we have multiple properties on one policy. It means we don't have to rely on the specific skills of each user and can apply more sophisticated rating factors.

"We are soon to start linking our web enabled schemes to the back-office via Open GI's X-Stream solution. This will create a two way XML interface between our website and the Open GI system so that customers can access and manage their policies online and make payments in a secure environment."

CASE STUDY

"The Open GI system is without doubt one of the most powerful on the market today. It's highly flexible, cost effective and has allowed us to expand into new areas."

Richard Hartley, IT Manager
Alan Boswell Group

Affinity schemes and the web:

Alan Boswell continues to expand its portfolio of affinity schemes. This includes facilities for members of the Royal Horticultural Society and the Association of Reflexologists (AOR). In order to facilitate online self-service the Group has recently launched a secure website for the AOR. Using InfoCentre, for seamless reporting from a SQL Database AOR membership administrators can access data within the Open GI system in 'real time'.

Richard explains: "AOR staff log-in to the site and can check the status of policies. For the AOR we administer policies for around 6,000 clients so the effective use of technology is essential. We are aiming to do the same for other affinity schemes."

Commercial registers:

With an ever increasing number of commercial clients, another area that Alan Boswell is keen to streamline is the production of commercial registers. Using Open GI's commercial registers tool – Open-R, policy information can easily be stored against the client file within the system. This means staff are able to use the structure of Open GI frames for data input but can harness the power and flexibility of Microsoft Word® for register production.

Richard said: "With Open-R, policy and risk information stored within the Open GI system can be simply extracted and collated into a single commercial register integrated with Microsoft Word®."

The Future:

Alan Boswell has achieved rapid organic growth in recent years. If the Group's e-commerce activity and affinity schemes expand as expected, the Group will quickly increase its presence both locally and nationally in the very near future.

According to Richard, the Open GI platform has already played an important part in the success of the business and will continue to do so. He said: "With the new recently launched tools, The Open GI system is without doubt one of the most powerful on the market today.

"The processing efficiencies achieved with Open GI enable us to continue to compete and deliver the best service to our clients – improving overall profitability. We've already made a significant return on our investment in terms of time and cost savings.

"Another great thing about the Open GI platform is that it integrates with other applications and helps us manage the compliance process. The latest range of enhancements to the Regulation Module, for example, will help us comply with client money rules and demonstrate we are providing contract certainty.

"Open GI's commitment to product development and the insurance industry as a whole, gives us the confidence to form a long-term partnership."

CASE STUDY

For further information contact Open GI:

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