



Company Profile

Company Name: Falcon Underwriting Ltd. (trading as Falcon Bikes)

Number of Staff: Four

Company Contact: Pinder Dhaliwal (Sales Director),
Mark Goddard (Underwriting Director)

Business Focus: New company specialising in Non-Standard Bike Insurance, specifically Performance Bike. Also trades Personal Lines e.g. Car, Van, Travel, Motor Trade, Public Liability, Pet and Caravan.

Location: Rowley Regis, West Midlands

Date Founded: April 2007

The Issue: To manage administration and maximise overall quotation capability and e-commerce offerings.

Falcon and Open GI:

Open GI Solutions: Open GI Linux platform, BikeWriter & MotorWriter Quotation Engines, OpenWord, OpenConnect, Open-R, Regulation Module, InfoCentre.

Falcon's Objectives:

Pinder Dhaliwal set up Falcon Underwriting in April 2007 with his business partner Mark Goddard, having both been brokers specialising in bike insurance for many years.

To fulfil their objective of creating a market leading insurance broker offering unrivalled service, they needed a solid IT platform that would support future expansion. So they carried out a review of major software houses.

Falcon opted for Open GI on the basis of overall usability of the system, its modern look and feel, the range of new technologies on offer and apparent value for money. Other software houses either did not appear to be moving forward with their technology, their systems were not user friendly and too regimented or they were pricing brokers out of the market.

Pinder said: "When we set up the business we were in a position whereby we had the relationships with underwriters and insurers and could offer highly competitive schemes, but we needed to develop our IT infrastructure. We wanted a solid platform that would allow us to manage our administration and maximise our overall quotation capability and e-commerce offerings.

"Open GI fitted the bill and more. We set out what we wanted to achieve with their account management team and soon realised they had the ability to build our own unique data capture frames, introduce rating calculations and provide software that could produce slick reports and client documentation – all of which would suit our modern office environment."

Open GI Solutions:

Falcon has implemented a number of Open GI solutions within its business – all of which run on a Linux platform offering great processing speed and reliability. Quote engines are in operation for bike and motor, enabling quotes to be provided from the widest range of carriers, and web-enabled versions are soon to be implemented in order to provide online quotes.

In terms of front-office solutions, Falcon staff use Open GI's new user interface, Open-i, which provides an easy to use working environment. Client documentation can be integrated with Microsoft Office® applications and auto-populated with data from the back-office - providing seamless workflow. Management information and reporting has also been improved via Open GI's SQL based data warehousing software, InfoCentre.

In addition, Falcon is currently developing a number of schemes on the Open GI platform for wholesaling.

CASE STUDY

"Open GI fitted the bill and more. The system not only suits our modern office environment, it also integrates with other applications and helps us extend our quotation capability to the web. We plan to grow the business and I am confident that Open GI is the right partner."

**Pinder Dhaliwal, Sales Director
Falcon Bikes**

Document Production and Open GI:

Falcon have been particularly impressed with Open GI's Microsoft integrated document management solutions:

OpenWord allows them to create documents using all of the functionality of Microsoft Word® and to extract client / policy data from their back-office using keywords. According to Pinder the software functions seamlessly with the Open GI system and creates professional looking letters and memos.

With **OpenConnect** Falcon can attach any Microsoft® / system related documents to client records enabling quick and easy access whilst on the phone to clients. Better storage / tracking of documents means regulatory requirements can be met more easily, particularly as there is a secure vault function.

Open-R is an enhanced registers creator allowing for the fast production of well presented registers in Microsoft Word®. According to Pinder, the step-by-step tree structure with sample headers and preambles is easy to follow and can be used for insurer, client and third party presentations.

The Web and Open GI:

Falcon have developed a web presence using Open GI's new web design and integration service. The look and feel has been designed to complement the company's advertising. Unique data capture screens have been developed by Open GI's web team so that prospect data can be imported for follow up. For customers preferring to complete their insurance over the internet, a comprehensive quote and buy facility is soon to be provided via Open GI's e-Quotes engines.

The Future:

In less than two months of using the Open GI system, the benefits are already evident for Falcon. Pinder said: "There's so much the system can do, we still have a lot to learn. However, we've already benefited in terms of overall trading efficiency.

"To be able to give clients unrivalled service our administrative and quotation processes need to be as slick as possible. As a new business, it's important we don't waste our time and energy on getting to grips with a system that doesn't fulfil our objectives.

"Some software houses seem to charge brokers a small fortune for systems that aren't supported, that can't cope with data volumes and that don't integrate with other applications.

"The Open GI system and especially the new document production software and e-commerce offerings have had a major impact on our business, allowing us to produce professional client documentation and extend our quotation capability to the web. The fact that their solutions are so cost effective allows us to pass on savings to customers – essential in today's competitive environment. We plan to grow the business and I am confident that Open GI is the right IT partner."

CASE STUDY

For further information contact Open GI:

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