

System Education Consultancy is a dedicated service for Open GI customers who have trained on the Open GI system, but find they are unable to realise its true value.

This could be applicable to new or established system users who feel that they have become stuck in a process that is limiting the use of their investment.

How It Works

System Education Consultancy is provided by a dedicated consultancy team. They deliver a bespoke programme that is tailored to your business needs.

The consultancy sessions are specifically aimed at system users who:

- Do not have the knowledge to make regular system changes as their business evolves.
- Do not have their system set up optimally, resulting in unnecessary labour-intensive and repetitive tasks.
- Do not have the ability to extract desired information from the system.
- Have been affected by non-system related issues, such as a company merger and want to get better use across branches.

The consultant will attend your site for the duration of the contract and work with you to clean up, organise and perform the changes to your system that you have requested.

How Does It Help My Business?

- System optimization is the priority; this will reduce the repetition of tasks and increase workflow.
- The service builds on your existing knowledge of your system, educating you whilst improving your system optimization.
- Consultancy will provide in depth focus on system features to help improve productivity.
- Our experience will help you identify areas of weakness and can provide advice on where staff may need further training.
- Consultants can help you improve your usage of the database, enabling you to extract the most relevant information.

What Does It Do For Me?

Many Information System failures occur because the system is not set up or being used in the way it was intended, this results in the perception that the financial investment in the system was not beneficial.

This consultancy service will provide you with the knowledge to rediscover the extensive functionality of your systems, enabling your business to run more efficiently and effectively.

The consultants who deliver this service work in tandem with our training and development departments, so you can be assured they are entirely up to date with all of our latest products. Therefore they will be able to provide you with the most effective consultancy available for your business needs.

Consultancy is bespoke to your business needs so you have the flexibility to select which products you receive consultancy on.

What Can Be Delivered?

System Education Consultancy is available for any Open GI back-office products, or a combination of several of them, depending on the time contracted for.

Below are some examples of possible areas for consideration that may benefit your business:

Back-Office Documents	<ul style="list-style-type: none"> ○ Review existing documents and enhance them. ○ Create new documents. ○ Incorporate documents within chaser sequences (Diary).
Frame Maintenance	<ul style="list-style-type: none"> ○ Review existing Level 1 frames and advise on keyword / field availability. ○ Review existing Level 3 frames and make recommendations / changes if appropriate. ○ Create new frames.
Calculations	<ul style="list-style-type: none"> ○ Review existing calculations and make recommendations / changes if appropriate. ○ Create new calculations.
Reports	<ul style="list-style-type: none"> ○ Review existing database enquiries and make recommendations / changes if appropriate. ○ Create new Database enquiries (using Reportnet if available).
Prospect Management & Regulation Module	<ul style="list-style-type: none"> ○ Review maintenance files and make recommendations / changes if appropriate. ○ Review frames and make recommendations / changes if appropriate.
Month and Year End & Insurer Reconciliation	<ul style="list-style-type: none"> ○ Review existing procedures and make recommendations / changes if appropriate. ○ Attend site at the time of month end / year end to monitor and assist as appropriate. ○ Attend site at the time of insurer reconciliation to monitor and assist as appropriate.
Main Files	<p>A review of the system's main files including:</p> <ul style="list-style-type: none"> ○ Broker amendment. ○ Insurer amendment. ○ Policy Type amendment. ○ Commission Type amendment. ○ Scheme cross referencing. ○ Executive amendment. ○ Chaser Sequence maintenance. ○ Instalment maintenance.
Software Upgrades	<ul style="list-style-type: none"> ○ Detailed demonstration of additional functionality gained following a software upgrade, such as the latest Core Back-Office release.

For further information contact Open GI:

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