



## CASE STUDY

## Preserver Automates Agent Communications

### Adeptia BPM Server & Agency-Carrier Interface Accelerator Step Up Two-Way Communications

Preserver Insurance Company (PIC) is committed to providing the highest standards of insurance coverages and services through independent agents. The company writes small and mid-sized personal and commercial business lines in New Jersey, New Hampshire, and Pennsylvania. Its subsidiary, Mountain Valley Insurance Company writes commercial business in the northeastern U.S. and another subsidiary, North East Insurance Company, writes personal auto and small and mid-sized commercial business in Maine and New York. The companies interact heavily with independent agents. PIC realized executing its mission of providing the highest standard insurance coverages and services through independent agents depended on managing and synchronizing agent communications. The goal? Excellent two-way communications, but first PIC had to conquer a challenge: how best to exchange information with the agents' various software packages.

PIC didn't want a canned package with unneeded features, so it chose Adeptia's agent-carrier communications. Adeptia deployed Agency Carrier Interface Accelerator (ACI) on its Business Process Manager Server (BPMS) product and let a code-free implementation of ACI perform the heavy lifting for two-way communications.

#### Pre-built Components Save Time

Adeptia ACI Accelerator saves valuable time with its pre-built industry standards. Pre-building is an integral aspect of Adeptia's philosophy to help customers quickly and efficiently deploy much-needed products. Leveraging pre-built Accelerators offers insurers quick and easy implementation of any business process.

ACI consists of the core Adeptia BPMS product, a web-based application letting agents and business users manage policy transactions, policy files, and data files using dedicated mailboxes and data repositories. It contains pre-defined process flow templates for download and upload and pre-defined adapters for common back-end applications like POINT, WPC, CoverAll, and INSTEC. With its pre-defined connectivity to IVANS and pre-defined ACORD AL3 and XML formats, 80 percent of ACI is pre-built, a major timesaving feature.



***“It was a lot easier than we expected it to be, and had a lot more functionality than our other interfaces.”***

***Elaine Salvadore,  
IT manager,  
Preserver Insurance  
Company***



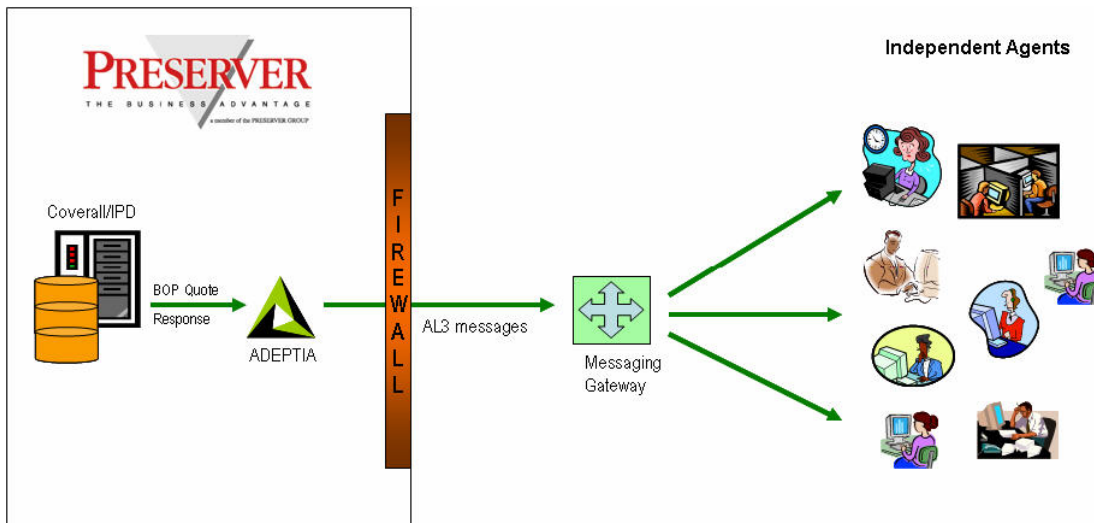
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### Behind The Scenes

From the outset, Adeptia planned to exceed Preserver's business objectives with a flexible solution that would let Preserver easily change the automated process flows based on changing business rules. Rules for process flows and data validation could easily be executed in English, with no coding, a tremendous advantage. Preserver initially had an interface between CoverAll and POINT and Adeptia leveraged it as well.

The planning and attention to detail paid off. Adeptia's carrier-side integration removes the agency's need to do "carrier specific" edits. Adeptia simplified and accelerated this phase using ACI's pre-built ability to connect to common policy management systems.

The BPMS solution process flow automatically logs in to applications to extract bulk data or individual policy-specific data. BPMS receives the data and parses it into individual data fields and elements. The policy records are marked as "read" at the application database to ensure one-time processing. The policy record(s) are processed per specified rules and mapping rules applied to each data field/element. Files are generated based on mapped fields/elements and formatted individually for each agent's software application and delivered to the messaging gateway for mailbox download.



BPMS coordinates automated activities and human workflow tasks, thus managing data flow and processing. The ACI accelerator, sitting atop the BPMS, helps create an automated data exchange with Preserver's agents' various agency management systems. Specifically, ACI automates communications between agents and carriers regarding quotes, policy issuance, renewals, endorsements, cancellations, and claims.

### Issues:

**Download of information from Preserver to the independent agents**

**Business to Business/External integration from Preserver's back-end policy management applications to external messaging gateway to the independent agent's agency software systems**

### Solution Objectives:

**Meet or exceed business objectives**

**Offer the technical features and functionality needed**

**Be flexible so it is easy to manage changing business rules**

**Maximize chances of success of the project and minimize risk of failure**



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### Crucial Benefits

ACI's benefits to Preserver include a more favorable experience for agents, better customer service, and increased revenue potential. In particular, it's much easier and convenient for independent agents to work with Preserver. Happy agents, goes the prevailing wisdom, are motivated to write more policies for the carrier easiest—and smoothest—to work with.

Preserver now maintains and manages the solution. When the business environment changes, Preserver easily adapts by changing process flows. ACI has simplified Preserver's process of working with new agents, letting the company more easily create new business opportunities. Top line revenue grows as data entry costs decrease, and eliminating errors helps reduce costs. Other crucial benefits include better customer service and response time.

Raising the bar for insurance transaction is always the order of the day, but Adeptia's BPMS and ACI now raise the bar a whole lot faster. And the stepped-up ability to exchange crucial information between Preserver and agents is speeding up business and accelerating bottom line growth.

### Inside The Technology

ACI in unison with Adeptia BPM Server or Integration Server helps Carriers create automated data exchange with their agent's agency management systems. ACI comes packed with process templates for upload and download, ACORD Metadata Dictionary, ACORD AL3 Schemas, and third party adapters like IVANS etc. ACI aims at improving agent experience and customer service, and increasing revenue potential.

### About Adeptia

Adeptia provides enterprise software that easily and quickly automates business processes across supply chains using industry-specific standards. Adeptia Business Process Management (BPM) software lets customers integrate disparate information sources, software applications, and business users within an enterprise and across customers, vendors, and business partners. Adeptia's technology lets customers drive efficiencies by designing, automating, and improving workflows. Adeptia Insurance Accelerators provide rapid data integration and automation and overcomes the barriers disparate vendor systems erect with external partners.

For more information on Adeptia Business Process Management Server and Agency-Carrier Interface Accelerator, contact sales at 312.229.1727 or [sales@adeptia.com](mailto:sales@adeptia.com)

### ***Deployment Results:***

***Project completed on-time concurrent with full system implementation***

***A flexible solution and it's easy to manage changing business rules***

### ***Immediate Benefits:***

***Favorable experience for Agents***

***Better Customer Service and Response Time***

***Increased revenue potential***

***Create new business opportunities***

**Don't Just  
MANAGE,  
AUTOMATE,  
OPTIMIZE,  
Business Processes  
Accelerate Them!**

**Adeptia, Inc.**