## Agenda

<table>
<thead>
<tr>
<th></th>
<th>Business Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Solutions Overview</td>
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<tr>
<td>3</td>
<td>Capabilities</td>
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<tr>
<td>4</td>
<td>Customer Success Stories</td>
</tr>
<tr>
<td>5</td>
<td>Insurance Products in Nut Shell</td>
</tr>
</tbody>
</table>
Customers Business Values Achieved through Winsure

- Increase Efficiency
- Increase Quality
- Improve Transparency
- Increase Agility
Business Values

Insurance Use Cases – Policy Administration

- Effective Rating Engine (Tariff Management)
- Quick Product Deployment - Time2Market
- Pro-active market penetration
- Strong Sales Channel Development

Sompo is the largest profitable company since 2004
Liberty increased total premium production by 400 %
Cardif increased total premium production by 300 %
Business Values

Insurance Use Cases - Claims Management

- Increase claims processing rates
- Integrating claims documents into the processes
- Consistent claims handling
- Real-time visibility into claims status ensuring deadlines are met
- Efficient Cost & Fraud Management

Liberty Turkey runs their complete claims management process on our Insurance solution.

Ray Insurance (VIG) increased the claims processing rate by 30%.

Reduces expenses and claims payments with our Insurance solutions.

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Business Values

Business Use Cases – Case Management (E-BPM)

- Empowering the case participants
- Enabling collaboration between case participants
- Monitor & react to case relevant events
- Ensure Complaincy & transparency
- Identify case resolution patterns and learn from them

All case participants have access to all information related to a case
Improved ability to solve customer queries
Improved case decision making with monitoring and alerting

www.BrindleyTech.com
## Agenda

<p>| | |</p>
<table>
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Solutions Overview

Enterprise Solutions of WinSure

<table>
<thead>
<tr>
<th>Vertical Segment Components</th>
<th>Horizontal Segment Components</th>
</tr>
</thead>
<tbody>
<tr>
<td>Claims Relationship Management (WinSure Claims+)</td>
<td>EcoSystem Management (Custo)</td>
</tr>
<tr>
<td>Reinsurance Management (WinSure Reinsurance+)</td>
<td>Contract Management (Contract+)</td>
</tr>
<tr>
<td>Executive Management System &amp; BI (WinSure Execusys)</td>
<td>Enterprise Business Process Management (EBPM+)</td>
</tr>
<tr>
<td>MultiChannel Management (WinSure EChannel+)</td>
<td>Call/Contact Center Management (EBPM+)</td>
</tr>
<tr>
<td>Marketing Mix Designer (WinSure Designer+)</td>
<td>Integration Framework under ESB (Inet)</td>
</tr>
<tr>
<td>NonLife / P&amp;C Insurance Carrier</td>
<td>General Ledger (GL)</td>
</tr>
<tr>
<td>Life Insurance Carrier</td>
<td>AR/AP Management (AR/AP+)</td>
</tr>
<tr>
<td>Pension Carrier</td>
<td>Enterprise Spend Management (Winspend)</td>
</tr>
<tr>
<td>Health Carrier</td>
<td>Payment Integrator (PayNet)</td>
</tr>
<tr>
<td>Broker</td>
<td>Operational &amp; BI Cockpit (Monitors)</td>
</tr>
<tr>
<td>Agency</td>
<td>PreSales Management (PreSales)</td>
</tr>
<tr>
<td>Banks</td>
<td>SFS Portals</td>
</tr>
<tr>
<td>Service Providers</td>
<td>Knowledge Management (Strador)</td>
</tr>
<tr>
<td>Reinsurance Companies</td>
<td></td>
</tr>
</tbody>
</table>

Our Kernel with Enterprise BRM (Providing components all kinds of technologies)

www.BrindleyTech.com
Solutions Overview

WinSure +
The End To End Insurance Solution Architecture

(SOA + Web + Mobile + EBPM + EBRM + Intelligence)

CORPORATE CUSTOMERS  PERSONAL CUSTOMERS  CORPORATE PROSPECTS  PERSONAL PROSPECTS

DIRECT DISTRIBUTION CHANNELS  INDIRECT DISTRIBUTION CHANNELS  ALTERNATIVE DISTRIBUTION CHANNELS  SERVICE CHANNELS

REAL-TIME SELF SERVICE COMMUNICATION
Web - Mobile - SMS - IVR - ITV
Kiosk - ATM - Other

PROACTIVE COMMUNICATION
Reports, Documents, Notices, Warnings, Activities by Email, SMS, Fax, Phone, Post, Other

TWO WAY CORPORATE SYSTEMS COMMUNICATION
SOA Based INET Services

SFS Portals or Other - SFS Portal Framework

SFS Monitors Or Other
Operational & BI Cockpit

WinSure ExecuSys or Other
Executive Management Systems - BI

SFS GL or Other
General Ledger

SFS Processors
CRM Based MultiChannel Processors

WinSure E-Channel or Other
Customer / Channel / Partner / Employee (Ecosystem Management)

SFS EBPM or Other
Enterprise Business Process Management

SFS PreSales or Other
PreSales & Opportunity Management

WinSure Claims or Other
Claim Relationship Management

SFS AR/AP or Other
Account Receivables & Payables Management

WinSure Reinsurance or Other
Reinsurance Management

SFS Contract or Other
Contract Management For Insurance & Financial Services

SFS Designers or Other
Winsure Designer - Marketing Mix Designer

SFS BTIKernel
Business Technology Interface with Enterprise Business Rules Repository

SFS Integrators - SOA Based Integration Framework - Inet

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Solutions Overview

WinSure Designer+
MARKETING MIX DESIGNER FOR TAILOR MADE INSURANCE & MARKETING STRATEGIES

BUTINESS ADMIN USERS
REAL-TIME SELF SERVICE COMMUNICATION
Web - Mobile - SMS - IVR - ITV
Kiosk - ATM - Other

IT ADMIN USERS
PROACTIVE COMMUNICATION
Reports, Documents, Notices, Warnings, Activities by Email, SMS, Fax, Phone, Post, Other

INTERNAL SYSTEMS & SERVICES
TWO WAY CORPORATE SYSTEMS COMMUNICATION
SOA Based INET Services

WinSure Designer+

DEPLOYMENT MANAGER
TEST & DEBUGGING MANAGERS
MARKETING MIX MONITOR & DOCUMENTER

PRODUCT MANAGER
Flexible Figures Designer
EcoSystem Information Designer
Risk Selection Manager

PRODUCT COVERS & PRICING MANAGER
Product Vendors Manager
Product Questions Manager
Product Plans Manager
Claims Designer

CHANNEL DESIGNER
Flexible Figures Designer
EcoSystem Information Designer
Risk Selection Manager

PROCESS MANAGER
Product Vendors Manager
Product Questions Manager
Product Plans Manager
Claims Designer

BTIKERNEL
ENTERPRISE BUSINESS RULES MANAGEMENT
Formula Manager
Table Manager
Question Manager
Evaluation Manager
Flexible Address Processor

OTHER BTIKERNEL SUBCOMPONENTS

SOA Based Inet Integration By Designer Services or Preintegrated with WinSure+
## Agenda

<p>| | |</p>
<table>
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</tr>
</tbody>
</table>
Rule Based Structure - Implement What You Think

**Agile** - Time To Market Advantages – No Programming – Apply At All Channels

**Flexible** – Supports All Kinds Of Strategies, All Lines

**Secure** - Marketing Mix Stays with the company

**Documentable** – Marketing mix & strategies

**Manageable** – Easy change management

---

**Division of Work**

**Customer**: Improving Strategy & Marketing Mix

Improving designs & components, R&D

**Service & Implementation Partner**: Keeping the service levels high

---

www.BrindleyTech.com
Supports Dynamic Pricing Models & Strategies
Ready for All Levels Of Information & SubModels

A SAMPLE OF DYNAMIC PRICING MODEL SUPPORTED BY WinSure Designer+

<table>
<thead>
<tr>
<th>Source [Internal/External]</th>
<th>Sample Information</th>
<th>Information Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insured</td>
<td>Career risk, Age, Gender</td>
<td></td>
</tr>
<tr>
<td>Coverage</td>
<td>The info whether the customer takes X and Y coverage together</td>
<td></td>
</tr>
<tr>
<td>Insurance Subject</td>
<td>GIS Based Risk Data (Burglary risk: Distance to police station, earthquake risk: distance to water)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Source [Internal/External]</th>
<th>Sample Information</th>
<th>Information Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel</td>
<td>Channel discount decision spending from his own bank</td>
<td>RISK LEVEL</td>
</tr>
<tr>
<td>Reinsurance</td>
<td>Personalized facultative reinsurance distribution prices; retention ratio</td>
<td></td>
</tr>
<tr>
<td>Underwriting</td>
<td>User privileges, channel privileges, rules using customer &amp; insured &amp; insurance subject information &amp; reinsurance treaties</td>
<td>POLICY LEVEL</td>
</tr>
<tr>
<td>Payment Plan</td>
<td>Whether customer wants to buy with cash or with installments</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Source [Internal/External]</th>
<th>Sample Information</th>
<th>Information Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Number of Products of the customer with its ecosystem, Customer profitability</td>
<td>CUSTOMER LEVEL</td>
</tr>
<tr>
<td>Marketing</td>
<td>Cross sales discount offer; sports club fan discount; telecom operator discount</td>
<td></td>
</tr>
<tr>
<td>Claims</td>
<td>Customer claim score</td>
<td></td>
</tr>
<tr>
<td>Fraud</td>
<td>Black list search</td>
<td></td>
</tr>
</tbody>
</table>

Enterprise Business Rules by WinSure Designer+ To Define

- Dynamic Pricing
- Tax and Commissions
- Other Monetaria: Figure Calculations
- Data Validations
- Coverage Selections
- Endorsements
- Renewals
- Risk Selections
- Task Assignments
- Delivery Assignments
- Cross Sales Suggestions
- Payment Plans
- Printouts
- Process Flows
- Reinsurance
- Claims
- Collections

By Using Insights From

- Customer
- Insured
- Insurance Subjects
- Channel
- Service Providers
- Claims
- Policies
- Underwriting
- Actuary
- Reinsurance
- Competition
- Collections

www.BrindleyTech.com
Tailor Made Strategies Specific to Different Target Markets
Bringing the world of insurance & marketing together

TAILOR MADE MARKETING MIX ELEMENTS FOR A SPECIFIC TARGET

SOME ELEMENTS OF INSURANCE MARKETING MIX

- PRODUCT
- PRICING STRATEGIES
- SERVICE DIFFERENTIATIONS
- SALES & SERVICE PROCESSES
- DEFAULT & OPTIONAL COVER PACKS
- RISK SELECTION RULES
- PAYMENT PLANS
- CLAUSES & FREE TEXTS
- CHANNELS & COMMISSIONS
- PRINTOUT TEMPLATES
- MARKETING PROCESSES
- PROMOTIONS
- CROSS SALES RULES
- ENDORSEMENT RULES
- RENEWAL RULES

TARGET MARKET

- A CORPORATE CUSTOMER
- PERSONAL CUSTOMER SEGMENTS
- COMMERCIAL CUSTOMER SEGMENTS
- RETROCESSION PLAYERS
- PERSONAL CUSTOMER LIFE CYCLE (Marriage, Birth Etc.)
- CORPORATE CUSTOMER LIFE CYCLE (New Contract, Office Etc.)
- A CHANNEL
- CHANNEL SEGMENTS
- WHOLE MARKET
## General Product Advantages

### WinSure +

**TIME TO MARKET & STRATEGIC MANAGEMENT ADVANTAGES WITH ENTERPRISE INSURANCE SOLUTION**

### Strategic Architecture
- Customer & Ecology Centric
- 100% Personalization
- All Lines of Business
- All Backoffice & Frontoffice Features
- Realtime Channels, Customers, Providers
- Integrated BPM & Enterprise BRM
- Local & WorldWide Use

### Superior Technology
- Full Thin Client
- Web & Mobile Based
- Fast & Scalable
- Service Oriented
- Semantic & Rule Based
- Ready to Be Hosted
- Easy to Use and Learn

### Highest Security
- SSL/VPN
- All Types Of Privileges
- Encryption & Authentication
- Login & Password Security
- Quality Audit Controller
- Audit Trails
- Virtual Keyboard

### Full Functional
- MultiCompany
- MultiVendor
- MultiChannel
- MultiInteraction
- MultiLingual
- MultiCurrency
- MultiEquipment
EBPM Centric with Vertical CRM Capabilities
For Your MultiEquipment, Multivendor Based Digital CRM Strategies

WinSure+ or Existing Systems
Automatic or Manual Action

Channel Performance & Control

ALL CHANNEL CONTACTS & ACTIVITIES IN ONE COMMON PLACE

WinSure+ Activity & BPM

SELF
ABC Insurance
Mortgage, building
Individual accident
ABC Life Insurance
Life
ABC Retirement Insurance
Retirement
DEF Insurance
My Doctor Related Products
ABC Bank
Mortgage
Consumer Loans
Joint Account Holder

BUSINESS PARTNER
ABC Bank
Joint Account
ABC Insurance
Comprehensive Cover

COMPANY
ABC Leasing
Leasing
ABC Bank
Company Account
DEF Insurance
Work Related Products

WIFE
DEF Insurance
Comprehensive Cover
Vehicle Related Products
ABC Bank
Automobile Loan

www.BrindleyTech.com
All Kind of Sophisticated EBPM Features
To create a real-time enterprise
## Full Enterprise Service Bus Architecture Framework

### Integrated SOA Based Services

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Authenticate</strong></td>
<td>• Secure Communication</td>
</tr>
<tr>
<td><strong>Receive &amp; Send</strong></td>
<td>• Receive &amp; Send in different methods from different resource, to different destinations</td>
</tr>
<tr>
<td><strong>Scheduler</strong></td>
<td>• Receive or Deliver data by its own scheduler</td>
</tr>
<tr>
<td><strong>Log</strong></td>
<td>• Log the original &amp; transformed data</td>
</tr>
<tr>
<td><strong>Transform &amp; Migration</strong></td>
<td>• Transform scheme &amp; convert data if the received data are in different structure</td>
</tr>
<tr>
<td><strong>Control</strong></td>
<td>• Check errors &amp; integrate to Winsure if no error (Validate agent’s permit etc.)</td>
</tr>
<tr>
<td><strong>Display &amp; Replay</strong></td>
<td>• Classify with error types, select &amp; reget them from resource or correct , report</td>
</tr>
<tr>
<td><strong>Optional Check commission</strong></td>
<td>• iNet can check the policies commission amounts</td>
</tr>
<tr>
<td><strong>Optional Reconciliation</strong></td>
<td>• Check the resource and reconcile if needed</td>
</tr>
<tr>
<td><strong>Manage</strong></td>
<td>• Manage all types of interactions in one integration framework covering two way integrations.</td>
</tr>
</tbody>
</table>

![Diagram of iNet Framework](image)

Straight Through Processing – Intelligent Sales
Decreasing Head Counts & Increasing Customer Service

**Intelligent Visibility & Flows**
*Intelligent Clause Attachments*  
*Intelligent Preprepared Texts*  
*Intelligent Risk Selection*  
*Intelligent Lists*  
*Realtime Agencies (All Lines)*  
*Realtime Customers (Marine)*  
*Sophisticated Banc Insurance*  
*Innovative Alternative Distribution Channels*

---

**CLASSIC COMMUNICATION**
- Service Request
- Unknown Information
- Proposal Request
- Missing Information
- Complaint Letter
- No Categorisation

**INTELLIGENT COMMUNICATION**
- All Inbound & Outbound Activities
- No Returns

**ADVANTAGES**
- Increased Data Accuracy
- Increased Happiness
- Increased Speed
- Decreased Operation Costs

---

**Automatic Proposal Information Fetch from Vendor’s System**
**Realtime Validation of Proposal Information**
**Tailor Made Insurance Pricing & Discounting**
**Automatic Payment Plans with Online Credits**
**Automatic Authorization and Risk Selection**
**Policy Acceptance**
**Real-Time Customer Payment Integrated with the Bank**
**Document/Proposal/Policy Printout**
**Automatic Policy Commission Payment & Calculation**
**Proposal/Policy Integration & Reconciliation with the Channel**
**SMS/Mail/Fax Interaction with Ecology**
**Automatic Reinsurance**
**Automatic Policy Delivery**
**After Sales Call Activity After 6 Months**

---

**Innovative Alternative Distribution Channels**

---

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Performance Analysis & Monitoring
Automatic Process Through Performance Indicators

Monitors Vision
Delivering all information through all kinds of interfaces for all Ecosystem Members

Different Roles & Hierarchies

Monitors Vision
Delivering all information through all kinds of interfaces for all Ecosystem Members

Use SFS General Ledger or SAP or Other - SFS Winsure will create all automatic vouchers – Support Local & International Insurance Accounting (Check from Chartis, Liberty, BNP Paribas, VIG )
Measuring & Reporting And Realtime Improvements Through Measurements

Realtime Pricing through Customer Profitability

Realtime Servicing & Colouring of Claims Files Through Customer Profitability

Risk Selection According To Customer Profitability At Proposal / Endorsement Proposal / Renewals Preparation Stage

Realtime Discounting & Incentives Through Channel Profitability

Realtime Commission Calculation Through Channel Profitability

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Customers & Solutions Success & Awards

11 Insurance Companies in Turkey, 1 in Azerbaijan, 1 in India
8 of them Multinational Insurance Companies
> 5,000 Broker & Agents, 6 Banks, Airways, Travel Agencies

Enterprise Insurance Solution – SOA, WEB, Mobile, CRM, BPM
Vertical & Horizontal Software Components
Innovative Service Network & Integration Framework – Inet

AIG
MEMSA
Norwich Union
The Best Solution

Microsoft
The Best Project

Selected for ECGC Insurance / India & Pilot Project for AXA Gulf

Communication Framework for 22 Insurance Companies
One of the First 15 Biggest Vertical Software Company (Interpro)

Financial & Payment Solutions Integrated with Banks

Agenda

1 Business Values
2 Solutions Overview
3 Capabilities
4 Customer Success Stories
5 Insurance Products in Nut Shell
### Customer Stories

<table>
<thead>
<tr>
<th>Customers</th>
</tr>
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<tbody>
<tr>
<td>10 Insurance Companies in Turkey, 1 in India</td>
</tr>
<tr>
<td>8 of them Multinational Insurance Companies</td>
</tr>
<tr>
<td>&gt; 5,000 Broker &amp; Agents, 6 Banks, Airways, Travel Agencies</td>
</tr>
<tr>
<td>Communication Framework for 22 Insurance Companies</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Solutions</th>
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<tbody>
<tr>
<td>Enterprise Insurance Solution – SOA, WEB, Mobile, CRM, BPM</td>
</tr>
<tr>
<td>Vertical &amp; Horizontal Software Components</td>
</tr>
<tr>
<td>Innovative Service Network &amp; Integration Framework – Inet</td>
</tr>
<tr>
<td>Financial &amp; Payment Solutions Integrated with Banks</td>
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<table>
<thead>
<tr>
<th>Success &amp; Awards</th>
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</thead>
<tbody>
<tr>
<td>AIG MEMSA The Best Solution</td>
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<td>Microsoft The Best Project</td>
</tr>
<tr>
<td>Selected for ECGC Insurance / India &amp; Pilot Project for AXA Gulf</td>
</tr>
<tr>
<td>One of the First 15 Biggest Vertical Software Company (Interpol)</td>
</tr>
</tbody>
</table>

www.BrindleyTech.com
Increased savings by reducing expenses and claims payments and increased productivity, thanks to consistent handling of all claims, e.g. alerts sent automatically when issues or bottlenecks are detected.

Global AIG Standards
- Early Warning Report
- Standard Reports-CL 106, MOR, OGIS 85, OPI
- Major minor lines and class peril codes

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Customer Stories

ISSUE:
Speed up invoice administration

ISSUE:
Integration with AIG Sales Partners (Banks and Alternative Distribution Channels)

• Bank Channels
  – HSBC
• Alternative Distribution Channels
  – Turkish Airlines
  – Pegasus
  – Amadeus
  – IDO
  – Electroworld
  – Teknosa
  – Dreams

www.BrindleyTech.com
Customer Success Story

ISSUE:
Claim process improvement

- Up to 60 percent more claims to be processed
- Winsure E-BPM automates business processes in the credit card department, reduces customer response time to reach higher customer satisfaction.
Customer Success Story

ISSUE:
Automating processes in premium production

- Cardif increased total premium production by 300%
- Full integration on Bancassurance
  - All TEB & Fortis Branches
Case Study

Supply and Implementation of Integrated Insurance Management System
Case Study

HSBC engages itself in all classes of general insurance & Life Insurance. Its business dealings are tailored to meet the needs of its esteemed clients.

The Company transacts all types of insurance policies, of which few are listed: Motor, Fire, Marine, Hull and Cargo, Workmen's Compensation, Personal & Group Accident, Money, Fidelity Guarantee, Burglary and House Breaking, Plate Glass, Liability, Domestic Package, Engineering, Computer All risks and others. Group Life, Group Medical, Credit Life, Individual Life, Family Medical, etc.

<table>
<thead>
<tr>
<th>Number of estimated users / Departments</th>
<th>Head Office</th>
<th>Branches</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>5</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Underwriting</td>
<td>20</td>
<td>40</td>
<td>60</td>
</tr>
<tr>
<td>Claims</td>
<td>13</td>
<td>5</td>
<td>18</td>
</tr>
<tr>
<td>Re-insurance</td>
<td>3</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Marketing/Production</td>
<td>5</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Finance</td>
<td>10</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>Administration</td>
<td>22</td>
<td>0</td>
<td>22</td>
</tr>
<tr>
<td>IT</td>
<td>4</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>Total</td>
<td>82</td>
<td>47</td>
<td>129</td>
</tr>
</tbody>
</table>
The proposed solution should be a total Management Information System solution to cover the operations of the companies. Integrated modules should house the following modules:

<table>
<thead>
<tr>
<th>Non-Life</th>
<th>Group Life</th>
<th>Group Medical</th>
</tr>
</thead>
</table>
| • Underwriting  
• Claims  
• Reinsurance | • Underwriting  
• Claims  
• Reinsurance | • Underwriting  
• Claims  
• Reinsurance |

<table>
<thead>
<tr>
<th>Individual Life</th>
<th>Marketing Management System</th>
<th>Financial Management System</th>
</tr>
</thead>
</table>
| • Unit Linked products  
• Annuity Plan  
• Term Plan | • Customer Database  
• Marketing Campaign Planning & Scheduling  
• Production Evaluation & Analysis | • General Ledger  
• Account Receivable  
• Account Payable  
• Banking  
• Basic Investment Ledger |

<table>
<thead>
<tr>
<th>Others</th>
<th>Document Management System</th>
<th>Customer Relations Management System</th>
</tr>
</thead>
</table>
| Business Intelligence Analysis tools  
• As if scenario analysis  
• Graphical representation of MIS  
• Portfolio Analysis based on various lines as per market practice | | |

Online module for Corporates & Brokers/Agents.  
Tender Module  
Tender Module  
Fleet Management
Case Study

Integrated Insurance Management System Solution Overview

Exporters Portal: MOSS
- Exporter/Agent
- Logs in
- Chooses Policy
- Request and submit application details

CPM: Stramar
- Policy Department
- Needs Analysis
- Discuss Products
- Initial Verification
- Generate Inward Reference Number

Core Insurance: Winsure
- Level 1/Applicant Scrutiny
- BUD
- Notify OL
- Premium
- Pre Processing
- Take Decision
- Calculate Incentive
- Issue Policy

Post Processing
- ACCOUNTING: Sun
  - Payroll
  - Create Voucher & Update AR
  - Post Premium
  - Issue Refund
- DOCUMENT MGMT: Newgen
  - Create Receipt
Case Study

ISSUE: Speed up invoice administration

Stakeholders:
- Govt. of India
- Exporters
- IRDA
- Export Promotion Council
- Berne Union
- RBI
- Banks/FIs
- DCA’s
- CAG
- Credit Information Agencies
- Commodity Boards
- DGCIS
- FIEO
- CII
- STPI
- Credit Rating Agencies
- CVC
- DGFT

Strategic Functions:
- Policy Planning
- Opening New Branches
- Organization Restructuring
- Ministry/ IRDA Co-Ordination
- Increase Channel Presence
- Corporate Planning
- Risk Management (RMD)
- Corporate MIS

Operational Functions:
- BUD: Re-Insurance
- MOU: Project Exports
- Domestic Credit Insurance
- Correspondence with Govt. Depts
- CUD: International Relations
- NEIA: Factoring Services
- Blocked Funds Recovery
- Bank Business and Business Development
- NMD: IRDA Compliance
- Investments
- Claims & Recovery
- Exporters Services & Business Development (ST & MT)

Support Service Functions:
- IT
- RTI
- MIS
- Documentation centre
- Secretarial
- Vigilance
- F&A
- Rajbhasha
- Admin
- Legal
- Development of Office Property
- Audit & Inspection
- Training
- Payroll
- HRD
- ISO

Products:
- Exporter Business (ST)
- Bank Business
- Factoring
- Project Exports
- NEIA
- Customer Specific Covers
- Domestic Credit Insurance
Case Study

**Presentation Layer Security**
(Authentication, Authorization, Encryption, Digital Signatures)

**Business Process and Service Layer Security**
(Message Security, Digital Signatures, Federation)

**Application Layer Security**
(Authentication, Authorization)

**Infrastructure Layer Security**
(Operating System Security, Database Security)

**Perimeter Security**
(Firewall, Reverse Proxy)

**Network Security**
(Routers, Hubs, Switches)

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Case Study

Technology Architecture

Portal and Delivery Channels, Content & Knowledge management
- MOSS 2007
- Dashboarding PerformancePoint 2007

Human-centric Processes
- Workflow Foundation in MOSS 2007

Service Layer
- Windows Communication Foundation + Workflow Foundation

Integration Layer
- BizTalk 2009

Application Layer
- Core Insurance: WinSure
- Reinsurance: WinSure
- Product Configurator: WinSure
- Factoring: Bespoke
- Finance & Accounts: Sun GL

Presentation Layer

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Case Study

ISSUE: Speed up invoice administration

Solution Architecture

MOSS 2007
Task List

GUI Screens
HRMS, BI, Admin, Custom, CRM, WinSure

Windows Workflow

Enterprise Service Bus
Rules, Integration, Admin, Bespoke, CRM WS, iNet

IIS – WAAS
Windows Communication Foundation

BAM, Centralized Policy Management
BizTalk 2009, BRE, Service Engine

Applications
HRMS & Payroll Dynamics AX, Finance & Accounts Sun GL
Factoring Bespoke, Marketing and CRM Dynamics CRM
Insurance WinSure

Data Sources
OLTP, Staging / ODS, Data Warehouse

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Case Study

ISSUE: Speed up invoice administration

CHANNELS
- Banks, Agents, Brokers
- Sales Representatives

CUSTOMERS
- Corporate Individuals

SERVICE PROVIDERS
- Claims Adjusters, Lawyers, Assistance Companies, Medical Services, Reinsurance Companies, Auto Rental Companies

FRONT OFFICE CRM SYSTEMS - Stramar - Winsure
- B2B Channel
- B2B Service Provider
- B2B Mobile WAP GPRS SMS
- IVR
- ITV ATM KIOSK
- E-Mail
- Fax
- Phone
- SMS

CENTRAL CRM SYSTEMS - Stramar
- Sales and Opportunity Management
- Activity and Workflow Management
- Electronic Form Management
- Campaign Management
- Performance & Competition Management
- Document and Report Management

DATA IMPROVEMENT SYSTEM

SCORING SYSTEM

MANAGEMENT SYSTEMS - Execusys
- Multi Dimensional Insurance Executive Information System
- Profitability System

ADMINISTRATIVE SYSTEMS

OPERATIONAL SYSTEMS - Winsure
- Policy
- Claims
- Reinsurance
- Accounts Payable Receivable
- Claim Reinsurance
- Health Claims

MARKETING MIX MANAGEMENT SYSTEM
- Marketing Oriented Designer
- Operation Oriented Designer
- Products
- Processes
- Pricing

CENTRAL CUSTOMER INFORMATION SYSTEM
- Customers & Prospects
- Channels (External Customers)
- Service Providers
- Employees (Internal Customers)

BTIKERNEL Corporate Technology Architecture

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## Agenda

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Common Insurance Products
Insurance Products in Nutshell

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Insurance Products in Nutshell

**StraMar Insurance | Multi Channel Sales Marketing**
StraMar Insurance, has been developed as an Operational CRM system for insurance enterprises. StraMar provides a unity for the ecosystem of insurance companies.

**StraMar E-Commerce | E-Commerce / E-Business System**
This product that allows online commerce and exists within the customer management (CRM) system.

**StraDor | Corporate Information Management System**
Corporate Information Management System StraDor is one of the latest generation products. The "Information Management" concept within the Customer Relations Management discipline is based on the principle that documents presenting the information created within the institution should be available for the institution units to use during operation processes.
WinFinancials | Financial Management System

WinFinancials is a functional, flexible solution that operates with multiple currencies and languages, where each component can be defined based on user preferences, can create consolidated reports by associating multiple companies' accounting departments and supports international accounting rules.

WinSpend | Corporate Expenditure Management

WinSpend is a Corporate Expenditure Management system developed with a flexible and parametric structure to adapt to each enterprise's logistics structure and operational needs.

StraDor | Corporate Information Management System

Corporate Information Management System StraDor is one of the latest generation products. The "Information Management" concept within the Customer Relations Management discipline is based on the principle that documents presenting the information created within the institution should be available for the institution units to use during operation processes.
E-BPM (Electronic Business Processes Management)

E-BPM is a platform that provides a front office, central office and service which establish all business processes of insurance companies (sales, service, central office etc.) and the intercommunication of these processes. This platform eliminates the need for e-mailing within the institution.

Winsure Agent | Insurance Agency Central Automation System

Winsure Agent is a CRM-based back office solution designed for insurance agencies. This is a fully integrated insurance solution that includes customer management, channel management, contract management, debtor/creditor accounts, reinsurance management (for reinsurance brokerage) as well as integration products such as IVR, CRM, Bank Integrator, Datawarehouse integrator and the GL Integrator.
Insurance Products in Nutshell

Elementary Insurance
Insurance Products in Nutshell

Winsure

StramMar

Strador

WinFinancials

StramMar

Winsure EBPM+

Winsure Agent

Winspend

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Winsure Elementer | Latest Technology Elementary Insurance Platform

Winsure Elementer Insurance platform is one of the rare back office and front office integrated complete insurance software systems in the world where insurance institutions can work jointly with their units, channels, customers and service providers and that embraces the Customer Relations Management principle. This software has been designed to direct the insurance institution's current and new strategies and help implement the changes rapidly and healthily when your strategy changes.
Insurance Products in Nutshell

Pension
Insurance Products in Nutshell

Winsure Pension

Winsure EBPM+

Winsure Agent

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Winsure Pension | Joint Sales and Service Management for Pension Companies

Winsure Pension is a system that allows the preparation of a pension contract, the preparation of principles related to tracking contribution payments to an account created by the company and accumulated amounts in the account being paid to claimants and other rights and obligations of parties, and the establishment of a group pension contract with the participant in form of a personal pension contract or based on an employment relation or with an organization on behalf of the participant.
Life Insurance
Insurance Products in Nutshell

Winsure Life

StramMar insurance

StradOr

WinFinancials

StramMar e-commerce

Winsure EBPM+

Winsure Agent

WinSpend

www.BrindleyTech.com
Winsure Life | Joint Sales and Service Management for Life Insurance Companies

Winsure Life is a system that insures against the possibility of individual’s passing within a particular period of time or under the condition and situations stated in the contract or the possibility of this person living beyond the period determined in the contract or both possibilities and includes tracking of the compensation process to each beneficiary or the insured party in the case of risk realization.
Insurance Products in Nutshell

Health Insurance
Insurance Products in Nutshell

Winsure Health

Stramark

Stradair

WinFinancials

Stramark

Winsure EBPM+

Winsure Agent

Winspend
Winsure Health | Joint Sales and Service Management for Health Companies

Winsure Health is the system that covers the proposal and policy compensation processes of products consisting of plans prepared to cover the health expenses of the insured party in case of illness or accident.
Insurance Products in Nutshell

Insurance Network Systems
INET | Insurance Network

Inet is the insurance network that establishes integration and cooperation between insurance enterprises.
Agency Systems
Winsure Agent | Insurance Agency Central Automation System

Winsure Agent is a CRM-based back office solution designed for insurance agencies. This is a fully integrated insurance solution that includes customer management, channel management, contract management, debtor/creditor accounts, reinsurance management (for reinsurance brokerage) as well as integration products such as IVR, CRM, Bank Integrator, Datawarehouse integrator and the GL Integrator.
Insurance Products in Nutshell

Broker Systems
Insurance Products in Nutshell

- **Winsure Broker**
- **StramMar insurance**
- **Strador**
- **WinFinancials**
- **StramMar e-commerce**
- **Winsure EBPM+**
- **Winsure Agent**
- **WinSpend**

Winsure Broker | Insurance Brokerage Solution

Following the Brokertec-2000, Brokebase and Brokeman, SFS software products used for many years by international brokers, Turkish brokers and multi-company agencies, Winsure Broker is the latest production. Equipped with the latest technologies and business models, this product is sure to provide companies with a competitive advantage with its customer-oriented structure.
Multi Channel Sales Systems
StraMar Insurance | Multi Channel Sales Marketing

StraMar Insurance, has been developed as an Operational CRM system for insurance enterprises. StraMar provides a unity for the ecosystem of insurance companies.
E-Payment Systems
PayNet | E-Payment Systems

PayNet is the system that allows all sales channels (agencies, banks, stores, automobile galleries etc.) to conduct sales with all bank credit cards and installment cards and will allow the performance of cancellation and return processes, accounting integration and bank settlement processes of sales. The ability to sell all insurance products including traffic with installment cards and the ability to use different bank cards and settlements on the same system is one of the biggest advantages of the system.
E-BPM Systems (Electronic Business Process Management)
E-BPM (Electronic Business Processes Management)

E-BPM is a platform that provides a front office, central office and service which establish all business processes of insurance companies (sales, service, central office etc.) and the intercommunication of these processes. This platform eliminates the need for e-mailing within the institution.
Let’s Begin!