INSURANCE CARRIER PORTAL
CUSTOMER CASE STUDY

FAST FACTS:

INDUSTRY: Financial Services (Insurance)

VIZURI CUSTOMER SINCE: 2005

LOCATION: United States

HARDWARE: x86 Intel Servers, IBM System i

RED HAT SOFTWARE:
JBoss Enterprise Application Platform, JBoss Operations Network, JBoss Seam Framework, RichFaces, Infinispan, Arquillian, RESTEasy, Red Hat Enterprise Linux

CUSTOMER OVERVIEW

The customer is a regional mutual insurance carrier offering property and casualty coverage for its personal and small businesses members. A network of more than 250 Independent Agents act on behalf of the customer to sell its products and services to meet its member's insurance needs. In response to downward pressures on price, skyrocketing costs of claims, and increasingly tech-savvy and demanding members and agents, the company formulated market strategies to improve the performance of their respective books of business and to engage afresh with their members. At the heart of that strategy was a modernization of underlying support systems.

The legacy support systems were built with a thick-client Java architecture that interacted through a series of proprietary products and data gateways to a central back office system running on an IBM iSeries machine. This architecture served the carrier well for many years, but over time became an impediment to innovation, which prevented them from responding to changes in the insurance marketplace and efficiently providing new features and functionality to their agents and members.

"With Red Hat products and Vizuri expertise and solution architecture, we were able to maximize cost efficiencies, remove complexity, standardize environments, and reduce CAPEX and OPEX costs associated with software licensing and personnel."

Insurance Company Vice President

Vizuri is an award-winning IT services and expert consulting firm that combines expertise in modern software architecture, tools, and processes with a solid foundation in engineering principles and a focus on open standards. Vizuri specializes in cloud enablement, enterprise application design, development, integration and performance management. Our clients benefit from our disciplined and focused approach to providing solutions that are unique and highly valued.

Additionally, Vizuri serves as a strategic partner and authorized reseller for a select group of leading Enterprise software vendors and cloud service providers including Red Hat, OpenShift, MongoDB, AppDynamics, and Amazon Web Services.

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SEEKING ENHANCED AGILITY, INTEGRATED PROCESSES, AND MOBILITY

Like many mutual insurance agencies, the company relies on a network of independent insurance agents to sell its products and services. Over a decade ago, they built policy administration and claims management systems to support these agents. The systems were homegrown, thick-client Java systems that enabled agents to inquire about their books of business, prepare insurance quotes and new business applications, and submit policy payments, endorsements, and loss notices.

The architecture of these legacy systems presented business challenges for the company, both operationally and strategically. It required the local installation and configuration of the thick-client at each agency's premises and connectivity with the centralized servers. This architecture was leading edge when the legacy application was built, but had become increasingly difficult and costly to maintain in comparison to contemporary browser-based solutions. Technical staff and customer service representatives had to invest extra time troubleshooting installation and configuration issues across dispersed, disparate client-managed environments.

Managing the coniguration of a distributed thick-client was not the only obstacle to becoming more innovative and agile. The company also had difficulty extending or integrating data access to other systems due to the tight coupling and dependencies associated with the proprietary vendor products. "The combination of a thick-client Java application and dependency on legacy technologies and vendor-specific interfaces made it challenging to introduce new processes or workflows," said the firm's Vice President of Technology. "We had to conform to external proprietary conventions, which limited our flexibility and increased the cost of making custom modifiations."

Moreover, the current infrastructure could not support a true mobile-enabled platform. "Increasingly, our agents wanted to access the system at any time and from anywhere with their mobile devices," said one of the firm's IT managers. "They felt restricted by the thick-client Java application, which tethered them to their desktops."

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>
> *Insurance Company*
> *Vice President*

JBOSS ENTERPRISE APPLICATION PLATFORM: A ROBUST AND SCALABLE PLATFORM FOR THE NEW PORTAL

The company decided to migrate from the thick-client architecture of the legacy application to a fully interactive website that would allow agents to conduct business electronically 24x7 from anywhere in the world. This new portal would be built with an open standards-based architecture, a modular and service-oriented design, and a highly extensible framework. It would secure protected personal information. And, it would have a lower cost of ownership.

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VIZURI SOLUTIONS ARCHITECTURE

To accomplish all this, the company needed a robust contemporary solution architecture with a broad foundation of industry support as well as mobile enablement. We recommended that the firm utilize Red Hat's JBoss Enterprise Application Platform, JBoss Seam, and Alfresco Web Content Management System as the core technologies for the new application. The JBoss Operations Network was also used to help manage the deployment. The company had used Red Hat technologies with the legacy application, but elected to evolve the solutions architecture to leverage a service-oriented architecture (SOA) design strategy, which exposed new service offerings and provided business agility by eliminating brittle point-to-point integrations.

Kent Eudy, Vizuri Integration Architect said, "The Java EE foundation provided by the JBoss EAP 6 platform provided a solid, standards based platform for building the new system. Its modular design enabled seamless integration with third-party and legacy systems without the typical dependency issues faced by other Application Server platforms. These features not only facilitated the delivery of the new system, but provided a solid framework for new features for years to come."

"With Red Hat products and Vizuri expertise in solution architecture, we were able to maximize cost efficiencies, remove complexity, standardize environments, and reduce CAPEX and OPEX costs associated with software licensing and personnel," said the Insurance Company VP.

"The decision to go with Red Hat products was obvious," said the client's Lead Programmer, "We are familiar with other application platforms and knew JBoss Enterprise Application Platform was an enterprise class solution that provided us many benefits over traditional proprietary servers in the market today. Red Hat product adherence to open industry standards was also a major selling point.

INTEGRATED TEAMS: MAXIMIZING RETURN ON INVESTMENT

Vizuri is a Red Hat Premier Business Partner, Preferred JBoss Certified System Integrator, and an expert in delivering highly valued business solutions utilizing SOA designs and distributed architectures. The client saw value in Vizuri's track record of helping businesses to adopt open source technology innovation and to evolve and become recognized leaders within their own industries.

"Strategic alliances were a central tenet to customer's strategy for the insurance portal," said Jeff Rabovsky, Vizuri Senior Program Manager. "The scope of this new project was ambitious, far beyond a technology refresh. It was a rethinking of the channels for writing and servicing business. Our client wanted an integration partner with experience and competence. A partner they could trust to take accountability and deliver value."

"Our employees are definitely one of Vizuri's biggest assets and the accomplishments are endless when it comes to our highly skilled, technical team and our dedicated, focused business analysts. Their training, skill set and tenure creates a high degree of competence that is rich in business acumen, systems architecture and design philosophy. With this, our team blended very well with the customer team to form an extremely high-performing, talented team." – Joe Dickman, SVP Vizuri.

BUILDING A FULLY INTERACTIVE PORTAL

The new, integrated policy administration and claims management system is deployed on the robust and scalable JBoss Enterprise Application Platform. Each component in the service-oriented architecture represents a business domain that is integrated vertically and horizontally within the portal solution. Adherence to open standards enables the customer to substitute existing or add additional components as technology evolves without incurring the maintenance costs previously associated with system upgrades or enhancements of the thick-client legacy application.

Because the new system's solutions architecture includes the Alfresco Web Content Management solution, it provides dynamic and targeted information to Agents without the need for the IT department's assistance. This means that business users from other departments, including Marketing, Underwriting, Claims, and Customer Service, can author, edit, and promote new web content.

ACCESS INFORMATION ANYTIME, ANYWHERE, ON ANY DEVICE

The new web-based interfaces were developed using JBoss Seam Framework and RichFaces, a JBoss Community project. Working with Vizuri, the client designed user interfaces that are simple, intuitive, and provide an improved experience for agents. This design strategy also enables the re-purposing of content to other devices based on device type, whether desktop web browser, smartphone, or tablet.
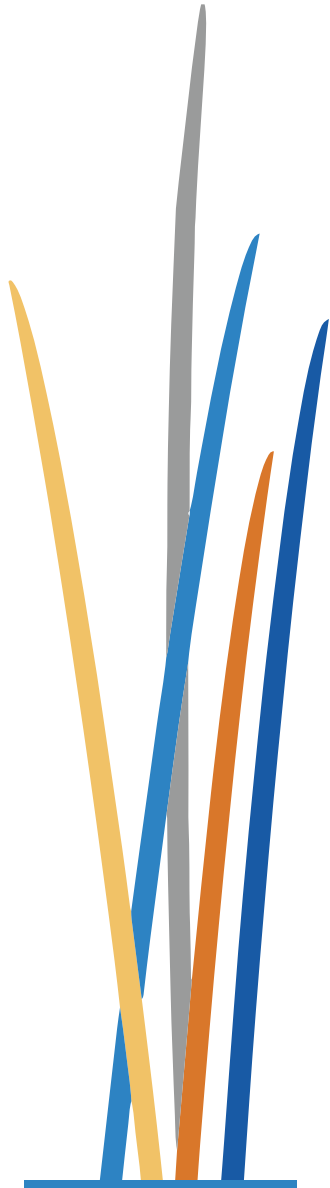
Using a SOA design strategy has also enabled the company to engage with third-party data and service providers (e.g. DMV, Rating Engines) to enrich the user experience, gain access to outside information, and to provide intelligence from which to evaluate and mitigate risks associated with underwriting policies.

With this design, the client now has the ability to integrate additional service providers or replace existing service providers without affecting significant or visible changes to any of the other system components.

CUSTOMER OUTCOME

Thanks to the new system, agents are able to work much more efficiently and effectively. When they were dependent on the legacy application, agents were limited to interacting with one customer at a time. A "conversations" feature now allows service representatives to multitask and accommodate multiple customers at the same time. The new system also offers the firm's agents better cross-selling and up-selling opportunities by enabling them to quickly access customer information.

The client's decision to move to a thin-client interface and SOA design is an extremely strategic one for the firm. In fact, this design can serve as the basis for technology and business endeavors for Insurance Carriers, as it enables them to deliver continuous innovation by removing the dependencies of legacy platforms, devices, and processes. "With Red Hat's product solutions and Vizuri's deep technical and domain expertise, Insurance Carriers have a partner to help define a vision for creating a foundation for innovation while leveraging legacy assets (e.g. back-end servers, databases, rule sets, etc.)." said Joe Dickman, SVP Vizuri.

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