

Available within the current BMS product:

- ✓ **BMS (SIG, VCIM) currently generates liability slips**
- ✓ **Can email to policy holder**



Additional features are available through add-on self service application- Keal CAP:

KEAL CAP

- ✓ **Integrates directly with SIG in real time**
- ✓ **Provides responsive web portal**
- ✓ **Provides more than just pink slips**

DATA INTERCHANGE

- **Directly integrates with and pulls data from SIG in real time – not overnight batch.**
- **2-way integration – Requests in Keal CAP generates Activities & Suspenses (Abeyance) in SIG**

MARKET EXPERIENCE

- **Keal CAP is live in the US as the Vertafore Client Portal and available to Canadian Brokers July 2017**

Key Features

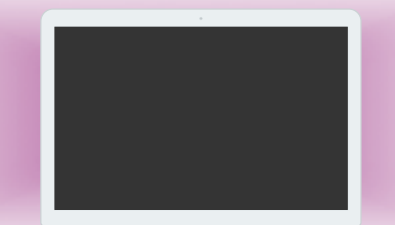
- ✦ **Electronic Pink Slips are available through this solution.**
- ✦ **Policy holders can access the portal via their internet browser on desktop and mobile devices.**
- ✦ **Your client data remains in your Keal ecosystem – there is no transfer to a 3rd party data centre.**
- ✦ **View policy details and electronic policy documents.**
- ✦ **Change Request & Claims notices are available**
- ✦ **Interfacing with carrier systems can be done directly in SIG.**
- ✦ **Available for CL/PL and other lines**
- ✦ **Responsive design adjusts to mobile devices**

COSTS

- ✦ **Costing details can be obtained directly from Keal.**

SETUP STEPS

- ✦ **Clients are automatically available in the CAP without need for the broker to enter manually.**
- ✦ **Invites can be customized by PL / CL or other business segment**
- ✦ **Branding/Colour scheme can be customized at the broker admin level**
- ✦ **Brokers can customize feature availability by client**





INFO SHEET

SIG

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Webinar Information:

Thursday Jul 20th, 2pm EDT - 20 Minute Complimentary Express Webinar

Join us to learn how clients connecting with their brokers at the time, place and method of their choosing. In this 20 Minute Express Webinar, we will discuss empowering your client to have 24/7 access to your brokerage and always have a copy of their liability slip on hand.

<https://tinyurl.com/ya84n9sd>



The Broker's Workstation

- ✓ BMS currently generates temporary liability slips (can email to policy holder)
- ✓ Update can be made by to TBW generate permanent liability slip

Custom Software
SOLUTIONS INC.

Additional features are available through add-on self service application- I-Client:

I-Client

- ✓ Integrates directly with TBW
- ✓ Provides responsive web portal
- ✓ Provides more than just pink slips

DATA INTERCHANGE

- Directly integrates with and pulls data from The Broker's Workstation BMS
- 2-way integration is available, pushing activities completed in I-Client back into TBW

MARKET EXPERIENCE

- I-Client is currently in a pilot stage with full broker release targeted for Fall 2017

Key Features

- ✦ Electronic Pink Slips are available through this solution.
- ✦ Policy Holders can access the portal via their internet browser on desktop and mobile devices.
- ✦ Your client data remains in your CSSI ecosystem – there is no transfer to a 3rd party data centre.
- ✦ View policy details and electronic policy documents.
- ✦ Submit inquiries and policy change requests to broker.
- ✦ Planned future releases that include functionality such as billing changes and a native mobile app.

COSTS

- ✦ Costing details will be available prior to full release and can be obtained directly from CSSI.

SETUP STEPS

- ✦ On-boarding process will be published out prior to the wider release in the fall.
- ✦ Estimated implementation timeline is 2-4 weeks.





INFO SHEET

The Broker's Workstation

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Webinar Information:

Please contact CSSI for details.

Applied TAM & Applied Epic

- ✓ **BMS generates temporary liability slips (can email to policy holder)**
- ✓ **Liability slip can be made available via Mobile App**
- ✓ **Update can be made by Applied to generate permanent liability**



Additional features are available through brokerage branded add-on mobile application:

Applied CSR24

- ✓ Integrates directly with Applied BMS
- ✓ Provides mobile app and web portal for access to pink slips
- ✓ Submit and review claims
- ✓ Extend online premium payments

Data Interchange

- Directly integrates with and pulls data from BMS in real-time
- 2-way integration is available to push activities completed in Applied CSR24 back into the BMS

Market Experience

- Applied notes that they are live with about 25% of their Canadian clients (208 brokerages live in Canada).

Key Features

- ✦ Electronic Pink Slips are live and available through this solution.
- ✦ Policy holders can download the app, or access the portal via their internet browser.
- ✦ Your client data remains in your Applied ecosystem – there is no transfer to a 3rd party data centre.
- ✦ Submit Policy Change requests.
- ✦ Also allows policy holders to access insurance documentation, make premium payments and track claims.
- ✦ Broker branding is applied in the setup process.

Cost

- ✦ Pricing can be obtained from Applied Systems directly.
- ✦ Promotions are available to support Ontario brokers prepare for the recent legislative change.

Setup Steps

- ✦ The setup process generally takes about 1 month on average for the app and portal.
- ✦ Applied will intake your branding and logo, and apply your look and feel to the app and portal.
- ✦ The external review process will impact the timeline, as an App Store release is required for the app.
- ✦ For rollout, you will send a URL to policy holders to initiate setup. They will then set their password.
- ✦ Alternatively, there is the ability for policy holders to access and authenticate themselves by providing some validation details, like policy #, and start the set up process themselves.



INFO SHEET

Applied TAM & Applied Epic

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Webinar Information:

Webinar is scheduled for August 15 – clients will receive an invitation from Applied Systems.

Sharp Mobile

- ✓ Pulls data from the broker's CSIO mailbox messages
- ✓ Provides customer self-service mobile app and web portal
- ✓ Provides more than just pink slips



COMPATABILITY

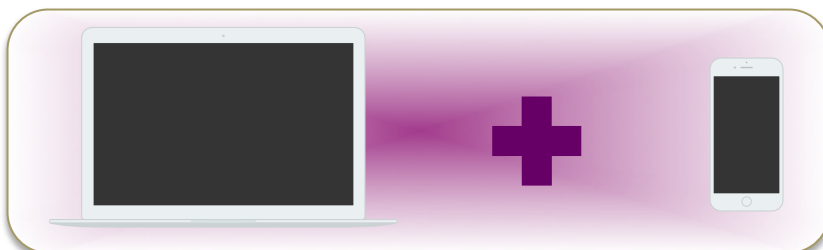
- This solution is compatible with any BMS as it only requires access to the broker's CSIO mailbox.
- Requires a one-time EDI Initial Load from your carriers to populate the Sharp data repository.

OVERVIEW

- Sharp Mobile is an add-on product that is BMS agnostic.
- After Initial Load, subsequent updates are automatically accumulated through a dual CSIO mailbox.
- The broker is able to brand the client view. Other features include, electronic policy documents, policy inquiry, push notifications and email communications.

MARKET EXPERIENCE

Sharp notes that they have 40+ brokers live, with more currently in the process of implementing.



Key Features

- ✦ Electronic Pink Slips are available through this solution.
- ✦ Policy holders can download the app, or access the portal via their internet browser.
- ✦ Solution works off of a separate repository of your policyholder data.
- ✦ Canadian Cloud Hosting or local server hosting available.
- ✦ Data API key available for integration to any third party software API (ie. Chatbots, Mailchimp, CRM tools, etc).
- ✦ Submit Policy Change requests.
- ✦ Push notification & email messages from broker to policy holder (incl. weather alerts).
- ✦ Full bank grade encryption throughout flow and storage of data.
- ✦ Two way integration available with Power Broker.

COSTS

Sharp implementation costs include the following:

- ✦ One-time set up fee
- ✦ Monthly reoccurring fee

SETUP STEPS

- ✦ Contracting is done with the broker, no dependency on carriers aside from an EDI Initial Load managed by the broker.
- ✦ A dual mailbox will need to be arranged with CSIO by the broker, that mirrors your CSIO download messages to a second, duplicate CSIO mailbox.
- ✦ The set up process is dependent on a few external parties (CSIO, your carriers), as well as set up on the Sharp side with your information.
- ✦ The timeline for implementation is 60 days. This includes the branding based on your specifications.

INFO SHEET

Sharp Mobile

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Or request more info through our website – www.sharpmobile.ca

Webinar Information:

Sharp has several webinars upcoming – please contact them for webinar details. Dates include:

July 26, 2017 9am MST and 1pm MST

Aug 2, 2017 9am MST and 1 pm MST

ClientDesk

- ✓ Pulls data from your BMS database
- ✓ Provides customer self-service mobile app and web portal
- ✓ Provides more than just pink slips

CLIENTDESK

COMPATABILITY

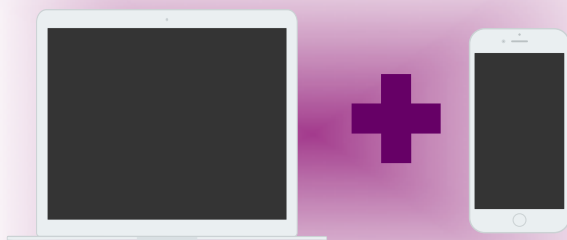
- **SIG – 1 way integration**
- **Power Broker – 2 way integration**
- ***TAM/EPIC – this is not a supported channel for Applied, and longevity is not known.**

OVERVIEW

- ClientDesk is an add-on product that works with several BMS. Data to feed their platform is pulled from your BMS. With PB, data is pushed back into PB in the form of activities.
- The solution is branded for your brokerage.
- Also includes presentation of electronic policy documents, policy inquiry and live chat.

MARKET EXPERIENCE

ClientDesk is live with initial SIG and PB brokerages, and notes that they will be live with a TAM broker this summer.



Key Features

- ✦ Electronic Documents and Pink Slips are available through this solution.
- ✦ Policy holders can download the app, or access the portal via their internet browser.
- ✦ ClientDesk provides a Police Mode to “lock” the mobile device screen displaying the pink card
- ✦ Retains a cloud hosted repository of data
- ✦ Submit Policy Change requests
- ✦ Push notification messages from broker to policy holders
- ✦ Live chat with broker or send direct messages
- ✦ Submit claims with pictures, videos and audio
- ✦ Find Services & Vendors

COSTS

ClientDesk has their traditional product offering of the full app, and will also be offering a version that is focused only on the display of the pink slip, at a reduced rate.

Full ClientDesk Platform

- ✦ One-time set up fee
- ✦ Monthly reoccurring fee

IBAO Tier – eDoc Feature Only

- ✦ Reduced Annual Fee
- ✦ Waived Monthly Recurring

SETUP STEPS

- ✦ Contracting is done with the broker, no dependency on carriers
- ✦ Policy holder data will be copied over from your BMS to the ClientDesk data centre
- ✦ A submission is required to the App Store for each brokerage setup – the lead time on this is typically 4 weeks
- ✦ ClientDesk creates user names and initial passwords for all of your clients, which you will then send out for enrolment
- ✦ A typical overall set up timeline is 4 – 6 weeks.
- ✦ Brokers can upgrade from IBAO Tier to full platform access at any time

ClientDesk

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Webinar Information:

- Webinars - ClientDesk hosts weekly, Wednesday webinars - full details are available here <http://www.clientdesk.co/#news>
 - 1st Wednesday of the month - 30 minute feature focus - Engagement: Push notifications, 1-1 Chats, Automated Campaigns
 - 2nd Wednesday of the month - 30 minute feature focus - Self-service: Electronic Document, Policy Change Requests, Claims Submissions
 - 3rd Wednesday of the month - 30 minute feature focus - Digital Consumer Experience: Apps and Portals
 - 4th Wednesday of the month - 1 hour full platform demo
- One-to-one online demo requests: <http://www.clientdesk.co/#bookdemo>