



System Optimisation

System Use and Optimisation

What do you have and how do you use it? Many brokers become frustrated when their existing technology does not give them the results they need or want. Frequently this frustration is not helped when the technology suppliers are not able to fully understand your business processes. The e-Zee team are all industry people who come from a broking or insurer background with a natural understanding of your business.

Common Areas of Frustration

Management Information

Can you see what you have, what you have done with it and what you could do? The e-Zee team can work with your people to generate a “Key Indicator” report that highlights those key elements of management information that help you run and manage your business. Our consultants are able to help implement data dashboards, review and understand software supplied reports or even create new reports for you in various tools, including Crystal.

Accounting Functions

It is not uncommon for your technology suppliers to have limited knowledge about accounting practices for Insurance Brokers, MGAs and Insurers. There may be opportunities to increase productivity, reduce errors and improve ROI. e-Zee can review these and provide tangible support for changing business processes.

Renewal Processes

Insurance renewals are a highly complex area for your business. Is your software helping you to make the most of your people? Your highly skilled people need to be able to concentrate on the retention side of renewal processing, not on the data entry side. e-Zee can review your renewal processes and help you utilise the more functionally rich areas of your software solution to streamline and automate many areas of renewal processing.

i-Market and other Commercial Quotes

Are you up to date on the opportunities around SME rating and the capabilities that your software house provides? e-Zee has worked with the main solutions for commercial processing and understands their capability. We can help you implement and extract the maximum benefits from the available functionality to help you gain advantage in this competitive area.

General System Reviews

e-Zee is uniquely placed to help any broker maximise its return on investment in technology. With experience of the main software houses and their use at a wide range of brokers, e-Zee can provide useful insight into your current adoption of technology. The e-Zee team can review your business by talking and working alongside your people to review all the areas of your software usage and create a report of where improvement can be made, with short term wins and longer term strategies for maximising return on your IT budget.