

## Broker Software Supplier Management

e-Zee can provide you with assistance in managing your relationship with your software supplier. e-Zee operatives have many years' experience being employed by or providing services to all the major software suppliers including Acturis, CDL, Open-GI, SSP and TGSL. This means that e-Zee operatives have a detailed knowledge of their software and access to the senior people within those organisations.

### Step 1 – Speak to e-Zee

Whatever information you have we can work with. What are your frustrations, needs, desires and what is the impact of these on your business plans? We can create a process and plan to make sure that you are getting the attention you deserve from your supplier.

### Step 2 – Fact Finding

The first thing we will do is detail all your frustrating problems and issues. This is something that isn't always readily available. We will speak to all areas of your business to ascertain their particular headaches and allocate each problem to a category – software functionality e.g. the accounts won't balance, software performance, the quotes engine is slow or software house service level - they never respond to e-mails or calls.

### Step 3 – Software House Contract

The next thing we will look at is your contract(s) to determine just what you have actually signed. Software contracts are generally biased towards the software house, so limits of indemnity will be minimal and they will not be responsible for any errors in the software or any consequential loss. There should, however, be a warranty that states that the software will perform in accordance with the specification and there should also be a service level associated with problems and incidents. The contract is important as that is where the culture of the software house is reflected.

### Step 4 – Prioritise

Having studied the contract we will have better idea of what you are up against so it now time to start prioritising your problems and issues in the order of financial impact / compliance requirements or business growth. To start with we will focus on items that evidently cost you money – direct costs such as system downtime or special rates not contained in quote engine. Then start looking at your processes and try and determine the indirect (or invisible) costs to your business e.g. do your printers produce duplex output? How long does it take to close the month/year end accounts?

### Step 5 – Speak to your Competitors

It's often an isolated existence for insurance brokers but a problem shared is a problem halved as the saying goes. Many of your competitors will be experiencing the same problems as you and may have secured a solution or a work-round. It's therefore a good idea to go and visit one of your competitors using the same software and talk. They will be more than happy to share their experiences with you and you may even acquire an ally in your tussles with your the software house.

### The Next Step

You will now be moving forward to achieving results. It might be worth noting that e-Zee is experienced in all aspect of system implementation, from data mapping and migration to system configuration. Our Project & Implementation Management factsheet may be useful. If you are having bespoke products created for delegated authority products and require assistance with either creating or testing these products (for your back-office or web solutions), please also have a look at our Product Creation and Testing factsheet.

### Proposals and Pricing

Before being appointed e-Zee will provide you with a formal proposal featuring the scope of works, consultancy rates and the expenses plus a contract.