PRESENTATION OVERVIEW

SECTION 1

The list of questions to ask the customer before developing a presentation of the programme plan

The assumptions made to present in this meeting (the answers to those questions)

SECTION 2

A presentation of the program plan which could be shared with the customer

SECTION 1

Key Questions and assumptions made

QUESTIONS FOR THE CLIENT

Strategic

- How has your company defined being at the cutting edge of insurance tech?

Operational, Tech & Process Based

- What is your current architecture stack? Are you changing any base systems
- How many people are involved in this process globally? Are they all following the same workflow?
- How many other strategic projects are the underwriters involved in?
- What is the operating model for the underwriting team- are managers based on one location or globally dispersed?

ASSUMPTIONS

Question for the client	Answer I assumed they gave	Implication
How has your company defined being at the cutting edge of insurance tech?	This is a working progress, and that is why they have reached out to hypereexponential	I have ensured the objectives of the project aligns with their overarching strategic goal
What is your current architecture stack? Are you changing any base systems?	Differs based on location	This has influenced time projections for integration, post project support and risks identified
How many people are involved in this process globally? Are they all following the same workflow?	Workflow differs based on location	This has impacted the workplan and resources estimated
How many other strategic projects are the underwriters involved in?	Transactional processes + more	This has impacted the workplan and resources estimated
What is the operating model for the underwriting team– are managers based on one location or globally dispersed?	One global model with negligible differences in operation for different offices	This has impacted the workplan and resources estimated

SECTION 2

Company Presentation

CompanyXYZ

Workflow Streamlining Programme

CONTENTS

01 **Product Overview**
- Your Objectives
- Our Objectives

02 **Project Overveiew**
- Use Cases
- Benefits Rundown

03 **Resource Plan**
- Development questions
- High level plan

04 **Deployment Plan**
- Gant Chart
- Risks and Dependencies

05 **Summary and Questions**

PROJECT OVERVIEW

Objectives

01 Deliver a time efficient system that puts you at the cutting edge of insurance tech and enables your underwriters to focus on value add activities

02 Enable access to the hx renew platform (for pricing models) and analysis of where processes can become more streamlined (manual to automated)

03 Provide you will the tools to be self sufficient and succeed – onboarding and tech support

PROJECT OVERVIEW

To successfully meet aforementioned objectives we will work with you to understand

Which type(s) of speciality insurance are dealt with

How the underwriter uses the platform

How they access information (internal and external sources for insurance calculation)

What application they are currently using as there insurance calculator/ platform

PRODUCT OVERVIEW

At a high level, our product **hx renew** is an intelligent pricing system, an upgrade to the former reliance on spreadsheet tools like excel

It allows you to build models faster by automating elements of the model building sequence, whether you are working on building a model from scratch or using our data resources to aid your build
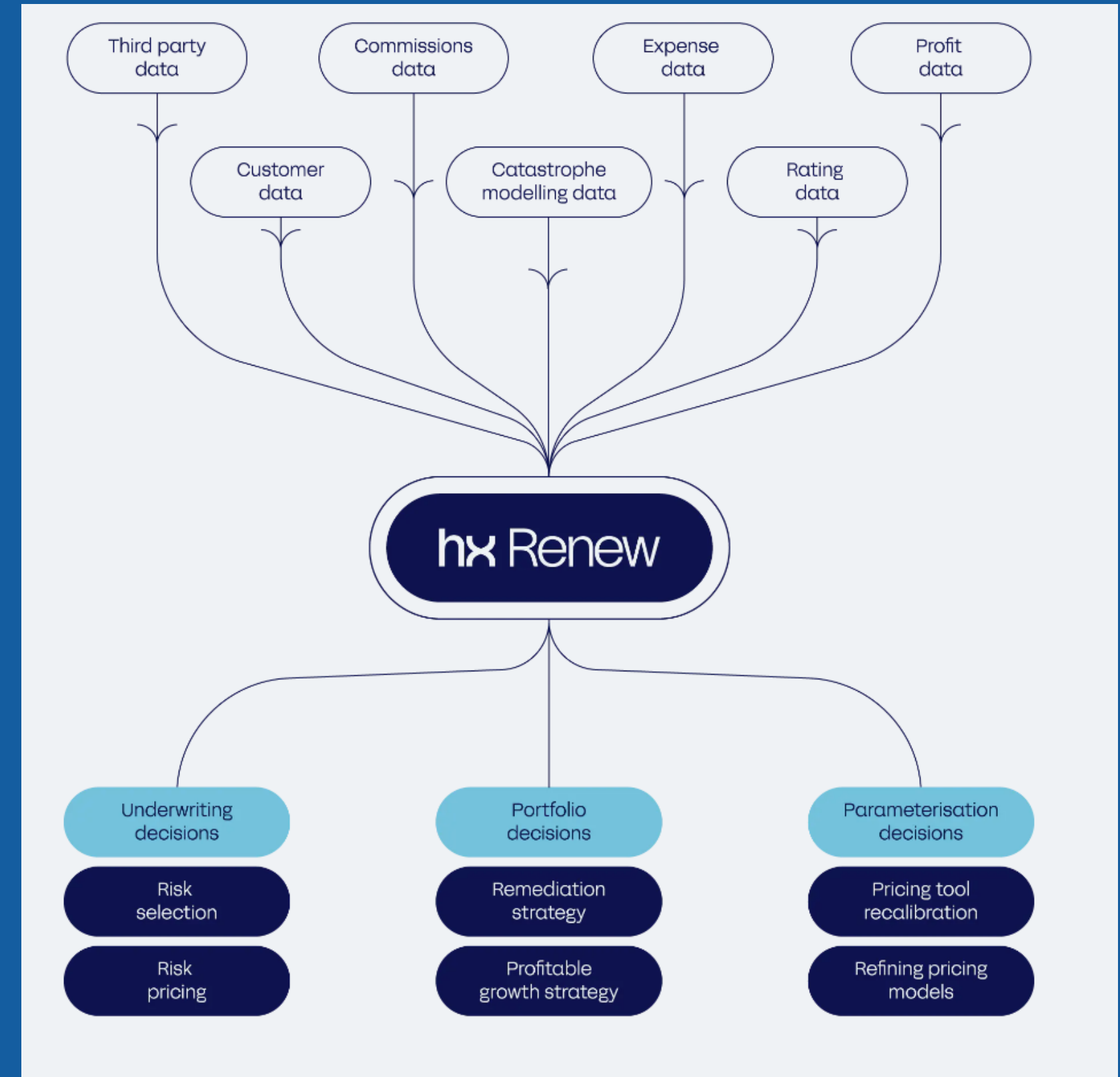
PRODUCT OVERVIEW

For your case, the focus is streamlining transactional processes to ensure that underwriters have more time for value-add activities

Their focus is on analysing the risks involved in insuring the asset involving tasks such as:

Writing policies
Calculating price of insurance premiums
Gathering background information
Assessing likelihood of insurance payout
Obtaining specialist risk assessments

(Just to name a few)

In hx renew, all of these tasks can be made more efficient using automation or other methods

So the lists of tasks become:

Check built-in underwriting guideline from model
Retrieve third party information using API calls
Relying on scalable and robust pricing architecture

(again, just to name a few)

Underwriting decisions

Risk selection

Risk pricing

PRODUCT OVERVIEW

BENEFITS RUNDOWN – WHAT THIS PRODUCT CAN DO FOR YOUR UNDERWRITERS

Your new underwriter workbench
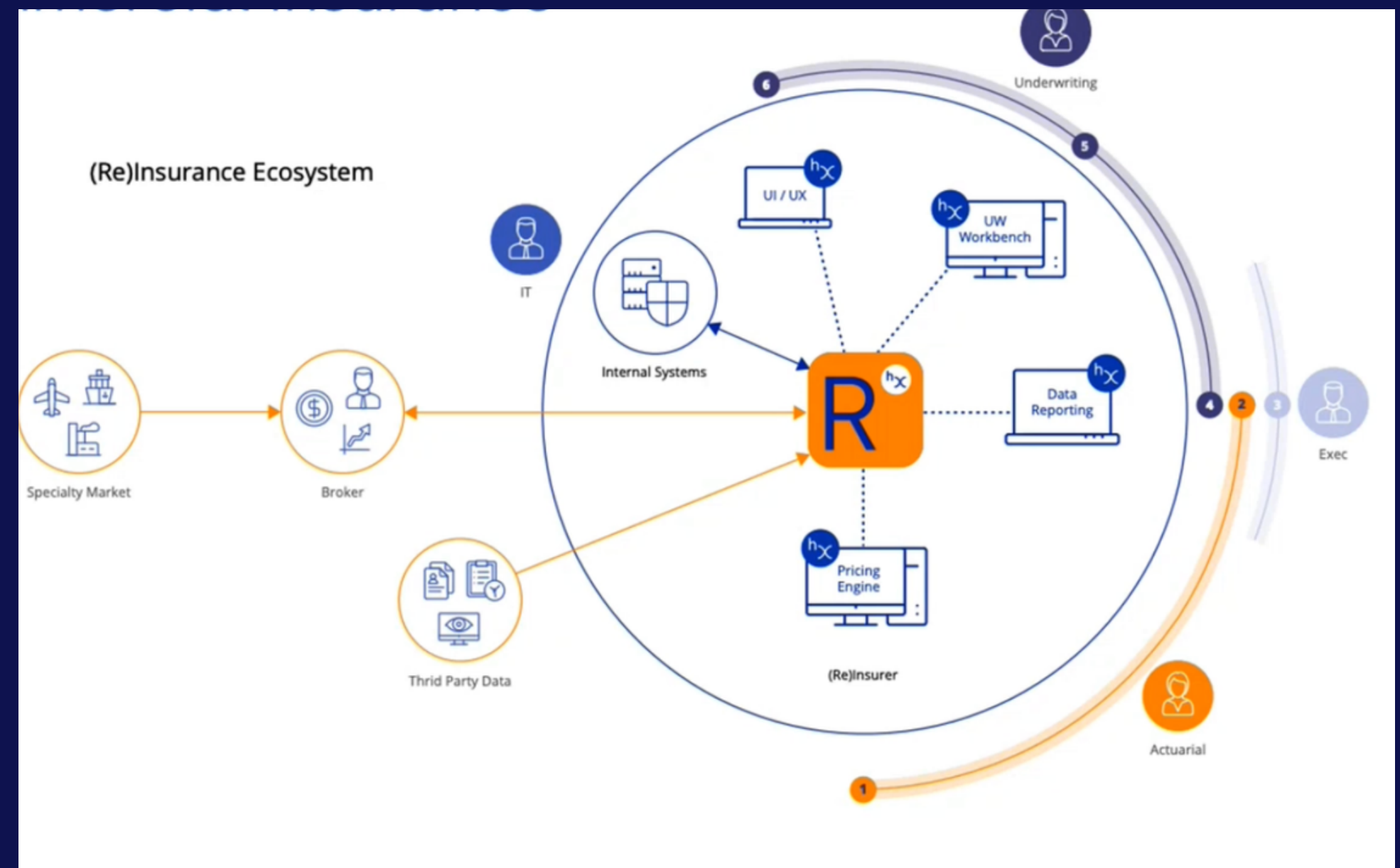No more siloed and inaccessible data
Multi-customer view
Audit and underwriting guidelines for clear trail of documentation
A single place for managing all

Low-code architecture
Real time operational reporting

RESOURCE PLAN AND PROCESSES

WORKFLOW ANALYSIS –QUESTIONS WE WILL DIVE INTO EARLY IN THE PROJECT

CORE QUESTIONS – OUR CLIENT SERVICES TEAM

Questions aimed at users (the underwriter)
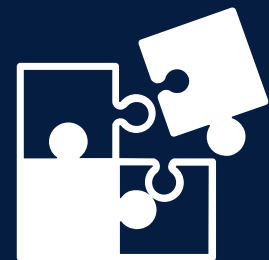
1. What does each user do on the system? Specifically, what tasks do your underwriters carry out on the system?
2. What is the workstream for underwriters on your current system?
3. How many members are on your team globally and in each location?

TECHNICAL QUESTIONS – OUR DEV TEAM

Questions aimed at IT Desk

1. What is the hierarchy of control for the current system? (levels of access, etc)
2. Who has control of the overall system and what does this allow them to do?
3. How does your current system work? (assumption that core system works on excel/ proprietary spreadsheet system)
4. Is this system the same in each of your locations?

RESOURCE PLAN AND PROCESSES

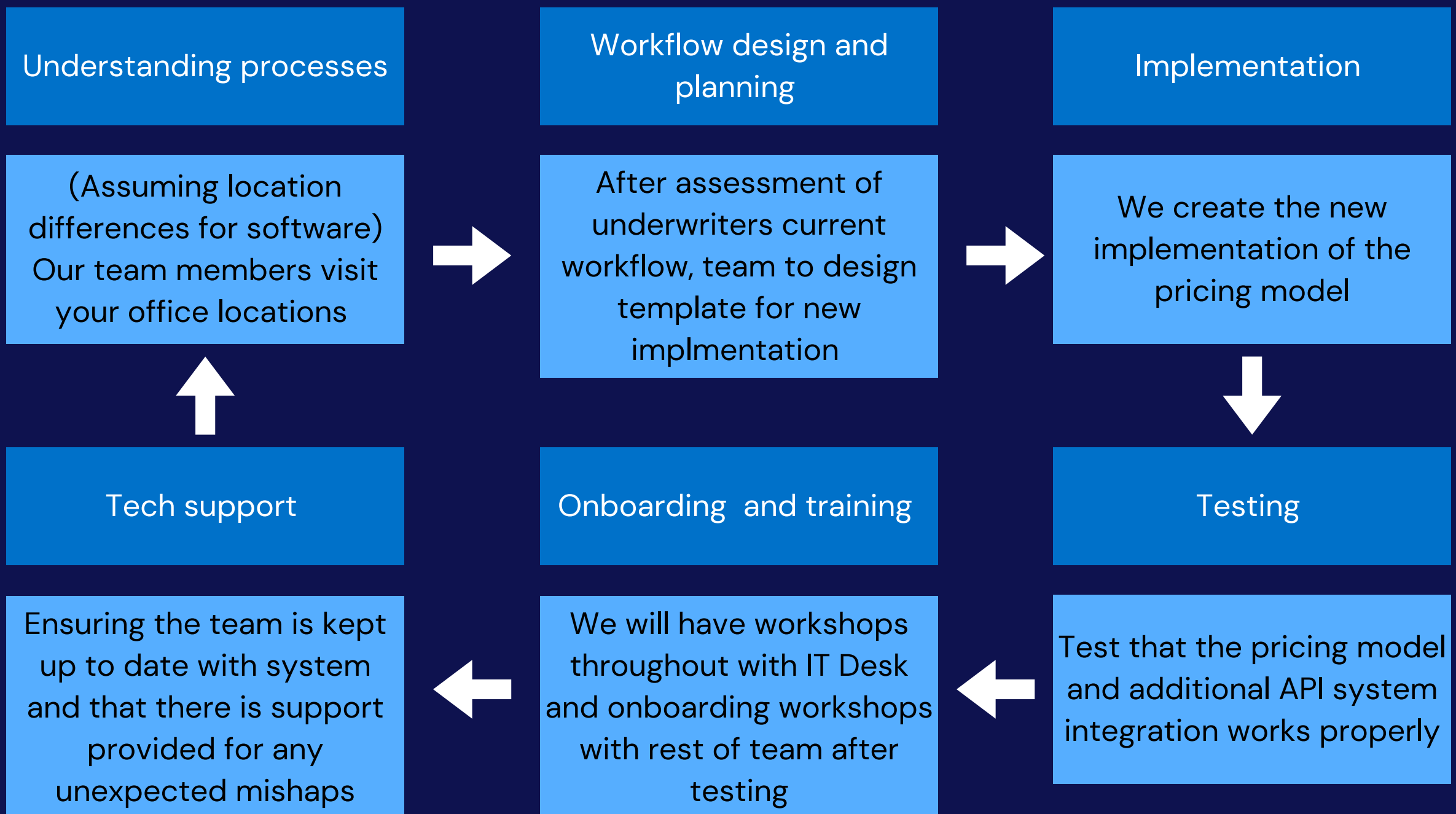## WORKFLOW ANALYSIS – BREAKDOWN

Additional modules for the same project (e.g. automating processes more processes for other users) will iterate from second half of diagram

Understanding processes

(Assuming location differences for software) Our team members visit your office locations

Workflow design and planning

After assessment of underwriters current workflow, team to design template for new implmentation

Implementation

We create the new implementation of the pricing model

Testing

Test that the pricing model and additional API system integration works properly

Onboarding and training

We will have workshops throughout with IT Desk and onboarding workshops with rest of team after testing

Tech support

Ensuring the team is kept up to date with system and that there is support provided for any unexpected mishaps

	WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6
Dev and Client Team • Go on site to offices (see how respective teams engage with their current software • Create Workflow diagram • Use workflow diagram to create new system implementation design • Feedback	Understanding the current system and work specific to underwriters					
	Go to offices					
	Current workflow diagram					
			New system design			
			Feedback			
Dev Team • Update and implement design to give • Give IT team access - IT team onboarding • Feedback			Implementing and integrating new modelling system			
				Develop specific modules for system		
				Admin aceess		
				Feedback		
Client Team • User onboarding				Final steps		
					Onboarding and training	

RISKS AND DEPENDENCIES

RISKS

	Priority	Impact	Team
General system issues with data storage	Low	All modules on hx renew are stored on the cloud. Data is backed up to ensure that there is no data loss.	Development team
Resource bottlenecks due to occupied team members	Medium	Potential backlog causing project delays	Client/ Development Teams
Data transfer issues	High	If current system is currently not compatible with hx renew, delays occur from entire system restructure and creating data mapping modules	Development team

RISKS AND DEPENDENCIES

DEPENDENCIES

	Category	Priority	Impact	Team
Authorisation for API calls	Dependency	Low	Our client requests to the server	Development team

SUMMARY AND QUESTIONS

- Streamlining transactional processes for underwriters
- Give your staff access to the hx renew platform and pricing models
- 6-8 week timeline
- Client and Development teams working on solution