



Mindtree

Welcome to possible

Improving employee and broker productivity with portal technologies

Our customer is one of the world's largest multinational insurance carriers. Based out of the United States, they have over 630,000 employees, servicing 40+ million customers across 160 countries. They offer a range of insurance products that cover property & casualty, commercial & consumer, life & retirement and mortgage.

The customer needed an enterprise portal platform that would handle the data, content and information needs of their brokers, underwriters, sales / marketing people and policy holders. The portal had to be implemented for both domestic and international locations. It had to have a single sign-on, 16 applications and integrations, with backend systems such as SAP, AS-400, Salesforce and Eloqua among others.

The customer felt the need to enable collaboration among internal employees. Various teams within the enterprise also wanted specific team sites where they could collaborate around different artifacts.

We were engaged with the customer from the early stages of the implementation and were responsible for the conceptualization, design and implementation. We now also handle the support, maintenance and continual implementation and improvement of the portal.

Business impact

- The broker / agent portal reduced calls to the broker service request teams by 80%.
- Consolidated user profiles provided better access to information on colleagues, making it possible to build meaningful networks within the enterprise.
- Improved collaboration and tracking, with structured storage of content and data.
- The centralized shared service unit focused on defining, standardizing & optimizing processes, governance & costs, to help streamline the servicing of various business units within the agreed SLAs.
- Lean teams for support and maintenance further reduced the ongoing costs of the implementation.

The customer is currently going through an IT refresh activity, to consolidate systems, content and data. Mindtree continues to work in close collaboration with the customer from a strategic as well as implementation standpoint.

Business challenge

The implementation was large, complex and required a detailed strategy and portal implementation roadmap. Some key challenges were as follows:

- The data and information required by agents / brokers were spread across multiple systems, which had to be unified and delivered to the users contextually.
- The portals had to cater to the information and collaboration requirements of varied groups of users with different needs. We were to find a common theme for information aggregation, delivery and collaboration.
- A consistent user experience was needed that would work with different user groups.
- The entire model for governance, best practices and management of the portal infrastructure and implementation had to be put in place.
- As part of the IT refresh, content and data spread across multiple silos were to be identified, consolidated and delivered through the portal interface.

Our approach

Mindtree developed the complete portal strategy and a multiyear, multistage roadmap. Appropriate priorities were assigned for the implementation, after close collaboration with key stakeholders.

The IBM WebSphere Portal was selected to implement the broker / agent portal. It was integrated with the existing Tridion WCM system to deliver the right content to brokers / agents.

The Microsoft SharePoint 2010 platform was selected to implement the customer's employee collaboration portal. The initial team of 40+ members consisted of experts in technology strategy & consulting, technical & functional architecture, design, implementation and quality.

The team was set up with an optimal allocation of onsite and offshore resources.

The project management and governance structure was put into place with scheduled activities, events and milestones for delivery of the portal.

Our solution

The broker / agent portal

We started the engagement by building a broker / agent portal based on the IBM WebSphere Portal. The portal was implemented for the US and Canada regions with the following features:

- A single point of entry for brokers / agents to access all the information they would require about the various insurance products and instruments.
- Different events and training material (including pre-recorded videos) were made part of the portal and delivered in a targeted manner, based on broker / agent roles.
- Simplified interfaces to author / create content and deliver it on to the portal.
- Implementation of rich user experience and personalization.
- Support, maintain and continued improvement of the portal features.
- Roll out of the broker portal for the APAC region.

The team collaboration portal

Mindtree engaged with the customer to implement Microsoft SharePoint 2010 based team collaboration portal. This portal consisted of the following:

- Reusable team site templates which could be quickly created and deployed for team collaboration.
- Management and maintenance of 200+ team sites.
- Team sites creation support for collaboration over quarterly reports and more.
- Consolidated profiles of employees, where the system allows for self service based mapping of employee IDs to the Active Directory (AD) IDs.
- Continual support and maintenance of the portal, as well as improvements to the portal features.
- McKinsey Lean Model adopted by Mindtree to deliver support and maintenance to the US / Canada based portal with a team of 13, for the WebSphere Portal and a team of four, for the SharePoint portal.

The Shared Service Unit (SSU)

As part of the IT refresh at the customer's enterprise, there was a need to implement a governance structure in place with the focus to define, standardize and optimize the process, manage demand from the different businesses and deliver streamlined services to the requesting units. Mindtree worked closely with the customer to enable them to:

- Conceptualize, define and come up with a framework for implementation of the SSU.
- Define the processes, activities and governance model for the SSU.
- Identify key roles, responsibilities and management structure for the SSU.
- Streamline technology processes and optimize the costs involved.

About Mindtree

Mindtree [NSE: MINDTREE] delivers digital transformation and technology services from ideation to execution, enabling Global 2000 clients to outperform the competition. "Born digital," Mindtree takes an agile, collaborative approach to creating customized solutions across the digital value chain. At the same time, our deep expertise in infrastructure and applications management helps optimize your IT into a strategic asset. Whether you need to differentiate your company, reinvent business functions or accelerate revenue growth, we can get you there. Visit www.mindtree.com to learn more.