OneShield® | Policy
P&C Solutions

OneShield Enterprise Solutions:
OneShield Policy

From acquisition to renewals, simplify every stage of the policy management lifecycle

OneShield Software understands how important policy management is to your success. With OneShield Policy, our flagship solution, you keep what pre-configured capabilities work best, while modifying business-specific requirements.

Our robust, flexible and easily configurable policy management system automates every stage of the policy lifecycle, from submission, qualification, rating and quote processing to issuance, endorsement, renewals and cancellations, new product launches and premium audits – all with detailed reporting and statistical analysis capabilities.

Whether deployed on-premise or via the cloud, OneShield Policy gives you the flexibility and capability to design your own workflows and automate time-consuming manual tasks. It is policy management made easy, with a solution that's market-tested.

At OneShield Software, we're technology experts with deep roots in the insurance industry. Our comprehensive portfolio of business applications is tailored for insurance industry leaders looking to reduce expenses, improve efficiencies and optimize service delivery every step of the way. OneShield can help enhance and improve your operational and process efficiencies, agent and member service levels, and time-to-market for new products and changes.

OneShield Policy provides everything you need for efficient policy management, streamlining even the most complex scenarios and freeing up time for the things that are really important — like growing your business.

"As-A-Service" (AAS)?

Looking to add organizational agility, operational efficiencies, unlimited scalability, collaborative access, and flexibility to your business?

Consider cloud-based "As-A-Service" technology: out-of-the-box integration frameworks and functionality, unlimited scalability, workflow automation, disaster recovery and failover protection, 24/7 technical support, and data security.

Working in the cloud with OneShield Software allows your business to be nimble, efficient and cost-effective — eliminating manual-based operations, enhancing speed-to-market, enriching analytics, and improving your bottom line.

AAS is why 95% of IT spending is expected to shift from in-house to the cloud by 2025, why 4 out of 5 carriers want to digitize core insurance operations, and why 66% of insurers are moving to the cloud to reduce overall cost of process delivery[t].

[t] Source: HFS Research November 2015

OneShield Policy

Deployed in the cloud or on-premise, OneShield Policy can help enhance and improve your operational and process efficiencies, agent and member service levels, and time-to-market for new products and changes. A configurable end-to-end policy management solution that automates and simplifies the complexities of your business through every stage of the policy life-cycle across all lines of personal, commercial, life and specialty markets.

General Features

- **Extensive pre-built insurance content for P&C and Life insurance** across all personal, commercial, specialty lines and variable and annuity products.

- **Empower your business and technical users** to work collaboratively to achieve 100% self-sufficiency in maintaining products.

- **Customer-centric solution** to enhance agent and customer service and manage individual interactions.

Policy Management Features

- **Work multiple submissions and active files in real-time** with producers, employees, insureds and third-parties for quoting, binding, issuing and servicing all transactions within a policy life cycle.

- **Customize rates** for ISO, NCCI or your own specific rates, rules and workflows through a fully-integrated or stand-alone rating component that uses shared, common product definition data.

- **Define and manage your own underwriting rules,** as well as any type of actionable outcome, including straight-through-processing (STP).

- **Integrated document management,** including acquisition, generation and organization — giving you a complete and accessible account file.

- **Reinsurance Cession Management,** using the OneShield Reinsurance module, allows you to register and manage reinsurers and cede business.

- **Grant treaty or facultative authority to reinsurer partners,** register agreements, handle proportional and non-proportional treaty and facultative agreements and track cessions by treaty or reinsurer.

- **Manage the work of your whole team,** including task assignments (both automated and manual), service groups, due dates, notes and email capabilities through our Task Management module.

OneShield Software: Powerful Technology and Tools

Configure Your Own Workflows to Create Efficiencies

- **Create your own processes framework** to configure discrete insurance actions into workflows for your specific business requirements, including workflows tailored by end-user roles.

- **Fully automate underwriting,** whether it is STP or intelligent referrals with decision support and traceability.

- **Set customizable rules** in over 200 diverse contexts, configurable via a powerful toolset.

- **Support any line of business** with a highly configurable workflow and rules engine.

Powerful Design Tool and Version Management

OneShield Designer - a metadata-driven solution powered by tools and a pre-populated insurance-centric data model, configures virtually every aspect of the software application — including workflow, product definition, object model, as well as interfaces to legacy and third-party systems.

Functionality and capabilities include:

- **Version Management** - tracks all design sessions and allows release engineers to identify, track, group, deploy or roll-back changes from development to quality assurance (QA), QA to staging, and staging to production. Version management is a metadata equivalent of a source-code versioning system.

- **Data Transformer** - facilitates data exchange across environments and seamlessly integrates data exchange within the workflow.

OneShield Solution Add-Ons

OneShield Portals:

- Enables web browser functionality so you can provide internal and external users with self-service capability on payment options and policy information.

- Various end-user roles and permissions can be defined for anyone involved in processing aspects of insurance transactions.

- Rules can also be configured to define individual user functionality, and what each user can or cannot see, right down to the field level.

OneShield Partner Relationship Management:

- Tools allow you to automate and control how you interact with third-party partners, enabling them to manage staff, write new business, process address/contact change information, access billing statements, and process monthly reconciliation.

OneShield Reporting:

- Provides near real-time data and reports for informed and timely decisions.

- Feature-rich reporting module provides dashboards, pre-defined cubes, standardized reports and ad-hoc reporting based on subject areas, such as quotes, policy transactions, tasks and referrals.

- Along with standard reports, cube and ad-hoc functionality allows for hundreds of customized reports, and fully supports the configuration of all management, financial, operational, statistical and marketing reports — including the ability to generate regulatory reporting as required by a client or governing body.

OneShield
SOFTWARE

Proven Technology Architecture

- **Scalable and data-centric,** OneShield uses stateless **Java EE** enterprise-class architecture for fast and simple changes to product definitions, workflows, rating and the object-model.

- **Built-in tools let you configure, test, version, release, and transform data** for integration and analysis without writing code — easily **exchanging data** with dozens of applications using a variety of transport mechanisms and protocols.

- **Our proven implementation model** includes full training and support, plus a unique mentoring approach for ongoing assistance.

Lower your Total Cost of Ownership with OneShield Policy

Leverage Extensive Pre-Built Insurance Content

- Pre-built library of insurance-specific content for personal, commercial, life and specialty lines.

- Pre-defined and configurable data models, workflows, rules, rates, reports, dashboards and product definitions — eliminating the time-consuming and costly "ground-up" requirements gathering process.

- OneShield Policy's pre-build content is so comprehensive some start-ups have taken the content "as-is", writing business within weeks from purchase.

Realize Advantages of Self-Sufficiency

- Ongoing maintenance and changes to your products to meet business and market drivers no longer requires outside consultants or specialized vendors.

- The intuitive nature of our design application and wizard-based development, OneShield Designer, empowers your business and technical users to work collaboratively to achieve 100% self-sufficiency in modifying functions.

- Improve business agility, enabling you to rapidly bring products to market — all while lowering management and maintenance costs.

Enhance Agent and Customer Service

- OneShield Policy is customer-centric, allowing you to manage individual interactions while providing a complete overview of existing customers across all terms and policies.

- As one policy can impact another, our model allows you to underwrite on an account-level, rather than policy-level, giving you the ability to easily launch customer loyalty programs and agent incentives.

- With rich reporting capabilities, OneShield Policy can quickly analyze agent and customer data helping you make informed underwriting and business decisions that can lead to more STP (straight-through-processing).

OneShield
SOFTWARE

Ready to Simplify Your Business?
It Starts with a Conversation.

OneShield Software delivers core business software solutions to the global insurance and broader financial services industry, deployed in the cloud or on premise. Our portfolio of standalone, subscription, and cloud-based software products includes enterprise class policy management, billing, claims, rating, product configuration, business intelligence, and analytics solutions that leverage a tool-based open architecture and single data model platform to streamline your business. OneShield Software automates and simplifies the complexities of core systems with targeted solutions, seamless upgrades, collaborative implementations, and lower total cost of ownership.

With corporate headquarters in Marlborough, MA and offices in India, Canada, and Australia, OneShield, Inc. has a total of 46 products in production across the P&C and Life insurance markets.

Visit us at OneShield.com or contact us now to learn how we can help simplify and transform your business.

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