

Core Suite.  
Use Case Driven.  
One Platform.



ORM

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Business Solutions.  
Simplified.

The relationship with your customer often includes a variety of external market connections. Understanding these touchpoints is critical to cultivating a positive customer experience. OneShield Relationship Management (ORM) allows insurers to enable and manage expanding ecosystems of all corporate entities, customers, and other 3rd party organization relationships by providing tools to automate and influence interactions. Now you can empower third parties to manage assignments, complete transactions, and access timely reporting.

ORM will give your business partners – agents, brokers, wholesale and program managers, reinsurers, inspection companies, repair shops, towing service, medical service providers, and legal services – real-time web access to information they need to support the customer acquisition and servicing lifecycle. Personalized documentation for all stakeholders, such as contact details and authority levels, allows you to maintain a profile of the relationship for any third-party entity. Varying roles and permissions can be assigned to individuals within an entity to segregate duties and ensure each user has access to the right information.

Deployed through our full-service SaaS delivery model, ORM can help you simplify your interactions with third parties, and rapidly support new initiatives. Its relationship management made easy, with a solution that's market-tested and a seamlessly integrated add on to OneShield Enterprise.

At OneShield Software, our strengths lie in our people, deep-rooted insurance knowledge, and our thoughtful technical architecture. OneShield Relationship Management provides everything you need for fast, efficient relationship management with your partners. It streamlines even the most complex systems and frees up time for the things that are really important – like growing your business.

**Maintain and customize programs and services during the customer lifecycle for all your external partner relationships.**

**Key ORM Features:**

- Automate time-consuming manual tasks by providing web access via self-service external portals.
- Handle the complex hierarchies of third party entities.
- Leverage existing tasks and workflows to streamline communication.
- Assign varying roles and permissions to individual partner users to segregate duties and ensure each user has access to the right information.
- Integrate with a wide variety of industry-standard applications to allow your team to upload and store attachments, as well as render essential communications such as letters and emails.
- Enhanced repository containing individualized documentation for all stakeholders, such as contact profiles, formalized contracts, compensation details.
- Maintain history and version control for any third-party entity.
- Central repository of all external relationship data.
- Customer-centric view across the application.

## Tools to Empower Insurance Professionals



**OneShield Designer:** Combining speed, power, and flexibility our intuitive design tool unlocks a world of endless possibilities needed to succeed in a digital insurance marketplace. Enabling self-sufficiency and speed to market, OneShield Designer empowers your business and technical users to work collaboratively to create and modify discrete insurance actions. OneShield Designer allows configuration of virtually every aspect of the system including workflow, product definition, object model, and web-services.



**Services Designer:** Leverage and extend services from our extensive catalog of coarse- and fine-grained services, supporting SOAP/REST, XML/JSON natively, via configuration, with built-in security in all services as well as periodic service penetration testing. Independent of a user interface, external applications use Services Designer (a service layer) to process transactions and store data.



**OneShield Portals:** Leveraging responsive and dynamic design OneShield Portals provide internal and external users with a wealth of self-service capabilities. Created with flexibility in mind, end-user roles and permissions can be defined at various levels and rules and workflows configured with the functionality required for each distribution channel.



**OneShield Reporting:** Actioning near real-time data and reports for informed and timely decisions OneShield Reporting uses dashboards, predefined cubes, standardized reports, and ad-hoc reporting provide access to client information, system transactions, financial, operational, statistical and marketing information for running your business operations.

## Experience Technology Agility

**Proven Technology Architecture:** Design, configure, and deploy all from our scalable JavaEE process automation platform. A well-constructed and comprehensive metadata-driven engine powers insurance transaction processing while providing the ability to handle both market and technology change cost-effectively with speed and transparency.

**Software from the Cloud:** Consider the strength of cloud-based “As-A-Service” (AAS) technology; unlimited scalability, ease of upgrades, quicker deployments, 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.

## Lower your Total Cost of Ownership with OneShield Relationship Management

**Automate Processes:** Automate billing process by providing customer and agent self-service options, supporting rule-based commission management, and digital bill presentment and payment all while reducing your operational costs.

**Leverage Extensive Pre-Built Insurance Content:** Our pre-built library of insurance-specific content for personal, commercial, and specialty lines eliminate time-consuming and costly “ground up” requirements gather process with our comprehensive pre-defined and configurable data models, workflows, rules, use cases, reports, dashboards, and product definitions.

**Realize the Advantages of Self-Sufficiency:** Attain self-sufficiency in modifying products and workflows. Improve business agility enabling you to rapidly bring products to market while lowering management and maintenance costs.

**Enhance Agent and Customer Service:** Maintain and customize programs and services during the customer lifecycle for all your external market partner relationships. Give your business partners – agents, brokers, wholesale and program managers, reinsurers, inspection companies, repair shops, towing service, medical service providers, and legal services – real-time web access to information they need to support the customer acquisition and servicing lifecycle.



## About OneShield Software:

OneShield Software delivers core business software solutions to the global insurance and broader financial services industry, deployed in the cloud or on-premise. OneShield Enterprise, 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 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 and Canada, OneShield Software has 50+ products in production across the global P&C insurance market.

Visit us at [OneShield.com](http://OneShield.com) or contact us now to learn how we can help simplify and transform your business.

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