

OneShield
Enterprise

Move at the
speed of change.

ORM

Solution Overview





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 third-party organization relationships by providing tools to automate and influence interactions.

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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 services, 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.

At OneShield, our strengths lie in our people, deep-rooted insurance knowledge, and our thoughtful technical architecture.





Deployed through our full-service SaaS delivery model, ORM can help you simplify your interactions with third-parties and rapidly support new initiatives.

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 really important things – like growing your business.

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ORM Administration:

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

Its relationship management made easy with a solution that is market-tested and a seamlessly integrated add-on to OneShield Enterprise.

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 and render essential communications such as letters and emails.
- Enhanced repository containing individualized documentation for all stakeholders, such as contact profiles, formalized contracts, and compensation details.
- Maintain history and version control for any third-party entity.
- A central repository of all external relationship data.
- Customer-centric view across the application.



Cloud-based

Tools to empower insurance professionals.



OneShield Designer:

Combining speed, power, and flexibility, our intuitive design tool unlocks limitless potential needed to succeed in today's insurance marketplace. Enabling self-sufficiency and speed-to-market, OneShield Designer empowers business and technical users to work collaboratively to create and modify discrete insurance actions. It allows the configuration of virtually every aspect of the system, including workflow, product definition, object model, and web services.



OneShield Portals:

OneShield's web portals are at the forefront of the digital-first landscape, offering a transformative self-service experience for both internal and external users. Through responsive and dynamic UX/UI design, our portals ensure a user-centric approach that adapts effortlessly to varying needs and devices. Moreover, we prioritize flexibility by allowing you to define user roles and permissions at multiple levels, while configuring rules and workflows to align with your specific distribution channels.



Services Designer:

An add-on to OneShield Designer, Services Designer implements a collection of vendor and product-independent pre-configured APIs, allowing external applications to remotely execute business transactions on the platform. Any processing, traditionally tied to the User Interface, or available solely within the platform, has been de-coupled and made available As-A-Service.



OneShield Relationship Management (ORM):

Enabling expanding ecosystems and third-party relationships, ORM provides tools to automate and control how you interact with third-party partners empowering them to manage staff, write new business, process address/contact change information, access billing statements, and process monthly reconciliation.



Technology that scales as your insurance business evolves.

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 power of cloud-based “As-A-Service” (AAS) technology; unlimited scalability, ease of upgrades, quicker deployments, disaster recovery and fail-over protection, 24/7 technical support, and data security. Working in the cloud with OneShield 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.



Cloud-based



Lower your total cost of ownership with OneShield Relationship Management.

Automate Processes:

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

Enhance Agent & Customer Service:

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

Leverage Extensive Pre-Built Insurance Content:

Our pre-built library of insurance-specific content for personal, commercial, and specialty lines eliminates time-consuming and costly “ground up” requirements gathering 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.

About OneShield

OneShield provides business solutions for P&C insurers and MGAs of all sizes.

Proven Technology Architecture:



Schedule a Demo

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Software from the

OneShield's cloud-based and SaaS platforms include enterprise-level policy management, billing, claims, rating, relationship management, product configuration, business intelligence, and smart analytics. Designed specifically for personal, commercial, and specialty insurance, our solutions support over 90 lines of business.

OneShield's clients, some of the world's leading insurers, benefit from optimized workflows, pre-built content, seamless upgrades, collaborative implementations, and pricing models designed to lower the total cost of ownership. Our global footprint includes corporate headquarters in Marlborough, MA, with additional offices throughout India.

Visit [OneShield.com](https://www.oneshield.com) to learn how we can help simplify and transform your insurance business.

Cloud-based Scalability

Deep P&C Knowledge