



Microsoft Case Study:
Insurance Industry, Client Extranet Portal

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- **Problem**

- A large Commercial Insurance company needed a better way to communicate with and distribute information to its clients. Information stored in internal applications built on Lotus Notes couldn't be opened up to clients because the user interface was not intuitive and did not provide sufficient safeguards to allow for external access. As a result, information was sent via emails to announce new policies and procedures. Due to spam filter restrictions, many customers failed to receive these updates and the company had no way to track who had indeed obtained the necessary information.

- **Solution**

- Burntsand and Microsoft Consulting Services partnered to build a solution that leverages Microsoft SharePoint Portal Server, Windows SharePoint Services, SQL Server, and Active Directory. The solution provided a simple and intuitive platform for an Extranet portal accessible by both clients and partners. Initially, only Compliance information is to be published to the portal, but eventually all departments will use the portal to communicate with clients and partners. The solution utilizes mainly out of the box web parts for document libraries, announcements, event listings, news feeds, surveys, and relevant links. A third party tool is used to facilitate data transfer between Lotus Notes and SharePoint. The site is organized so that cross-client information is presented at the top level portal site while client specific and user group specific sub sites reside one level below.

- **Benefits**

- Provides a single centralized distribution point & delivery mechanism for information to Clients.
- Ability to target non-public marketing information and focused communications to existing Clients
- Mechanism to track client access of critical information.
- Future launch point for all Client targeted applications

- **Key Technologies**

- Microsoft Windows SharePoint Portal Server and Windows SharePoint Services
- Microsoft SQLServer Enterprise Edition, Active Directory, and Microsoft .NET Framework



**Insurance Company
Client Portal**

Improved communications and knowledge transfer with Clients via an Extranet accessible SharePoint Portal

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Client Extranet Portal – Key Benefits

- Speed / Efficiency
 - Faster access to information that is in one location, and is more accurate and reliable than searching through prior emails
 - Access to archived information
 - Clients can receive system generated notifications when updates are posted
- Consistency / Quality
 - Customer has a repeatable and reliable business process resulting in a consistent response to clients
- Extensible
 - The architecture is designed and built to allow for easy addition of clients to the solution as well as adding support for future departments (Underwriting, Claims)
 - Platform for accessing future client-focused applications (e.g. Client Reports, Help Desk ticket submission)
- Provide Analytics
 - Can track what clients have accessed document updates