



# Policy Management System for Brokers

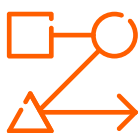
Automating the insurance lifecycle

## End-to-end policy management for retail brokers

Our Policy Management System for Brokers (CTI Broker PMS) manages the entire business lifecycle by automating every stage to provide visibility and enhance reporting. It enables brokers to dedicate more time to serving their clients and less time on administrative tasks, transforming customer data into valuable insights, and enhancing efficiency at every phase of the broking process.

The solution encompasses a wide range of offerings, including personal lines, intricate corporate enterprises, and affinity groups, covering all aspects of property, life and health insurance, as well as bonds and guarantees. It boasts over 165 implementations globally, serving more than 20,000 users.

### BENEFITS



#### **Simplify policy management**

Our single platform makes management of the broking lifecycle simpler, with insightful reporting and transparent auditing at every stage.



#### **Reduced errors through standardisation**

The platform makes it easy to create consistent quotes, slips, cover notes, endorsements and more at the touch of a button.



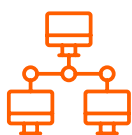
#### **Ensure compliance**

The platform meets IBS requirements and enables compliance with FCA regulations.



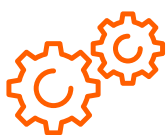
#### **Customer insights**

By transforming data into meaningful customer insights, brokers can better understand client needs, anticipate market trends, and deliver personalised offerings.



#### **Global capabilities**

The solution offers multi-currency, multi-language and configurable tax schemes with reduced time-to-market for product development.



#### **Customisation**

Through configuration tools, alarms, user reports, and dashboards, the platform provides a personalised experience for each client.



#### **Native integration**

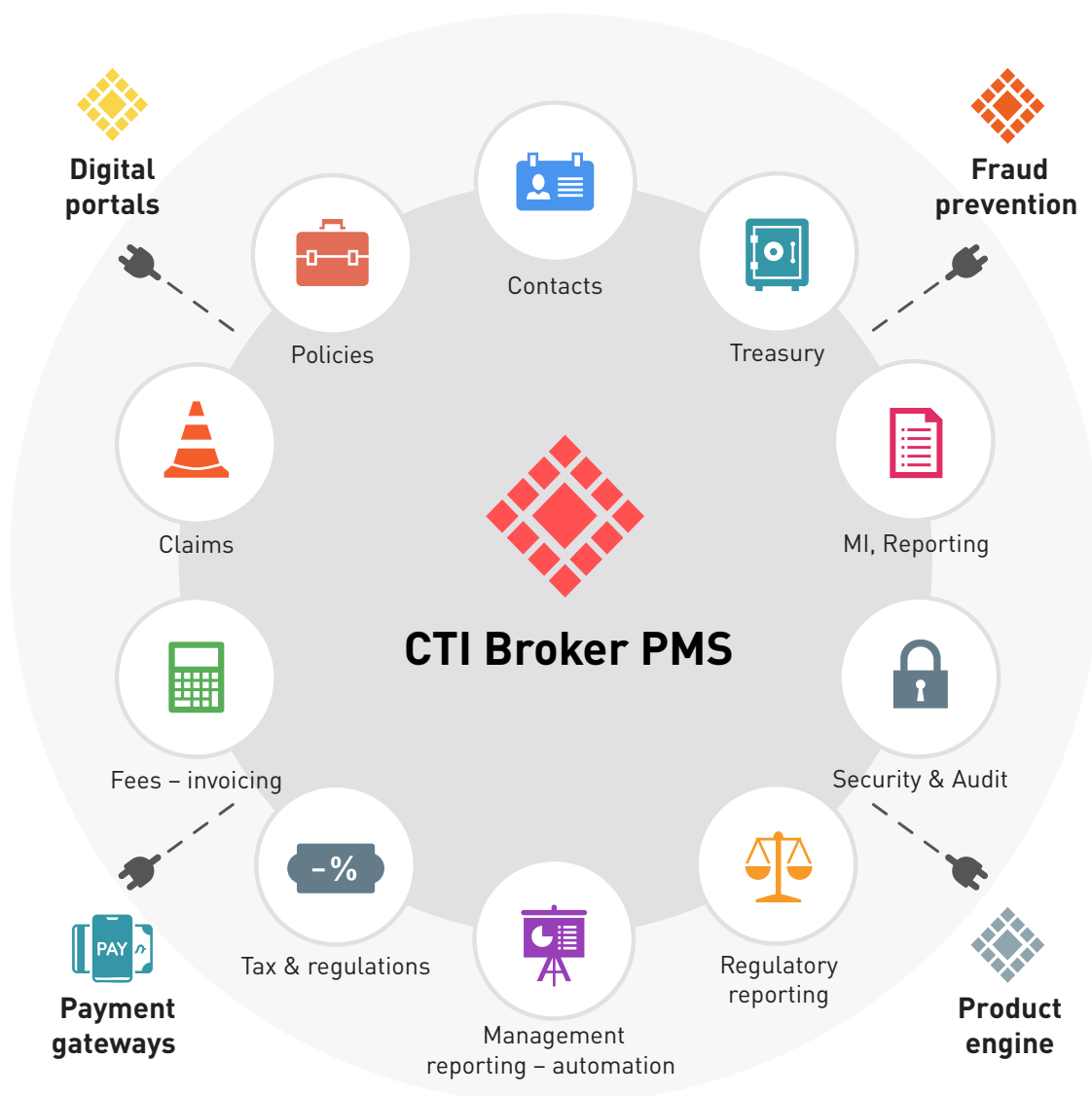
CTI Broker PMS is natively integrated with InHub for seamless integrations with other applications, such as Product Engine, digital portals and third-party systems via Open API.



#### **Cloud agnostic**

The solution works seamlessly with Azure Cloud, Google Cloud or on premises, providing secure multi-regional capabilities and database services.

## Key functions



 InHub Connector

### CASE STUDY

- A global retail broker had offices in four countries, each with multiple systems to support their operations.
- We implemented a digital core and digital front office to support the broker's digital transformation. The centralised digital core enabled the company to implement standardisation.
- This solution provides digital support for critical business processes, reducing errors. It also enables the broker to offer increased post-sale customer service.

Contact us today for more information:

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