

Broker Tools and Ease of Doing Business

Presentation to TASCnet

March 3, 2011



AGENDA

- **Broker & Operations Applications & Strategy Team**
- **Tools and Integration offered by RSA today**
- **What we are hearing from brokers**
- **What we are working on for tomorrow**
- **Questions for your input**
- **Q&A**

BROKER OPERATIONS & APPLICATIONS STRATEGY TEAM

- Presenters

- Jonathan Hunt
- Keith Mottram

- Role and Focus

- We aim to strategically deliver and promote tools and solutions that will drive efficiencies in the distribution of our products, while offering an “ease of doing business” proposition that strengthens broker relationships. Also work on solutions to help the company take significant steps in its efforts to be more environmentally responsible.
- Our team serves the 3 brands: RSA, Western Assurance, and CNS in BC
- Our team maintains relationships with brokers, vendors and other industry partners to maintain a strong grasp of insurance distribution in the marketplace. Events like TASCnet meetings help us keep in touch with our brokers

BROKER TOOLS AVAILABLE TODAY

- Client Inquiry
- Broker Experience Reports
- Open & Closed Claims Reports
- WebBusiness (Personal Lines Transactions)
- Rapid eQuote suite (Commercial Lines Quotes)
- EZ-Docs (Electronic Documents)

BROKER INTEGRATION AVAILABLE FOR TAM TODAY

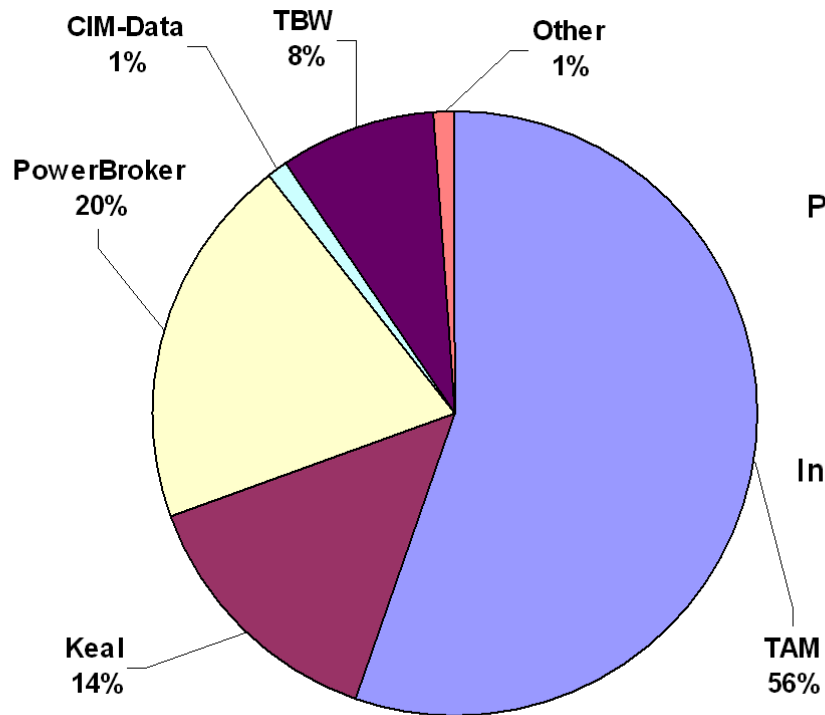
- WARP
 - Single Sign-On into BRAVO
 - Bridging to Inquiry and WebBusiness
 - Real-Time Inquiry (Billing, Claims, Policy)
- Rating Tool Integration (Compu-Quote Data Exchange)

WHAT WE ARE HEARING FROM BROKERS

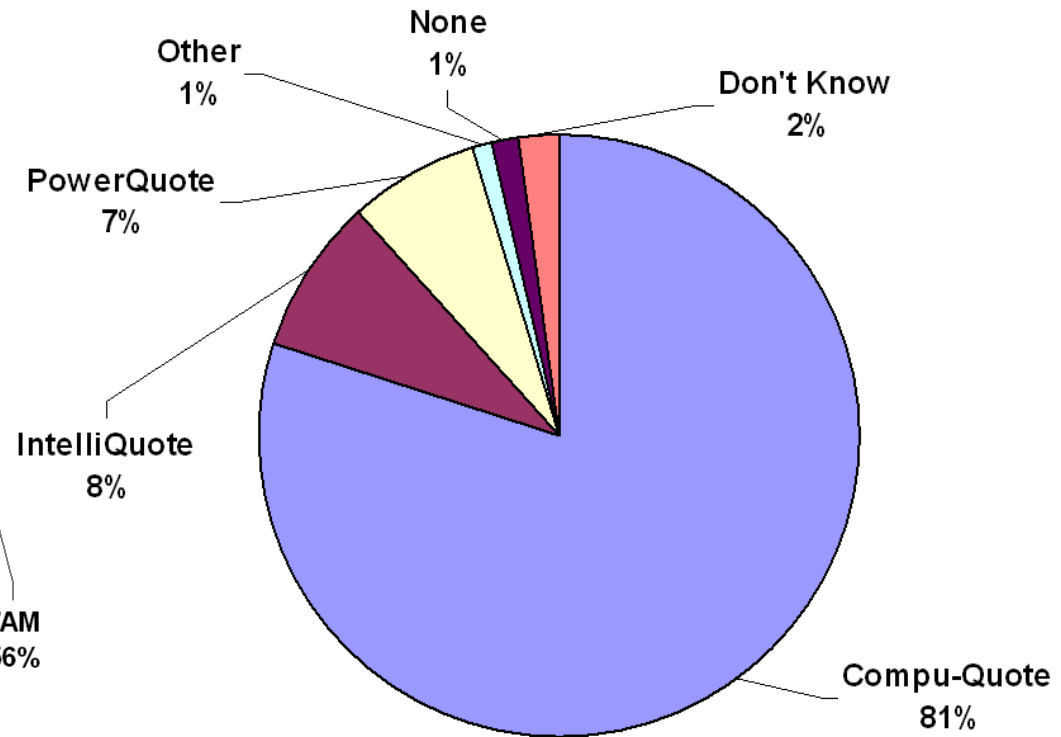
- Conducted an extensive survey in Q1 2010, asking about:
 - Broker management systems and comparative rating tools
 - WebBusiness and Rapid eQuote
 - Workflows
 - Paperless and EZ-Docs
 - Training and support for insurer applications
 - Capabilities for insured customers
 - Competitor rankings

BROKER TECHNOLOGY USAGE

BMS Usage



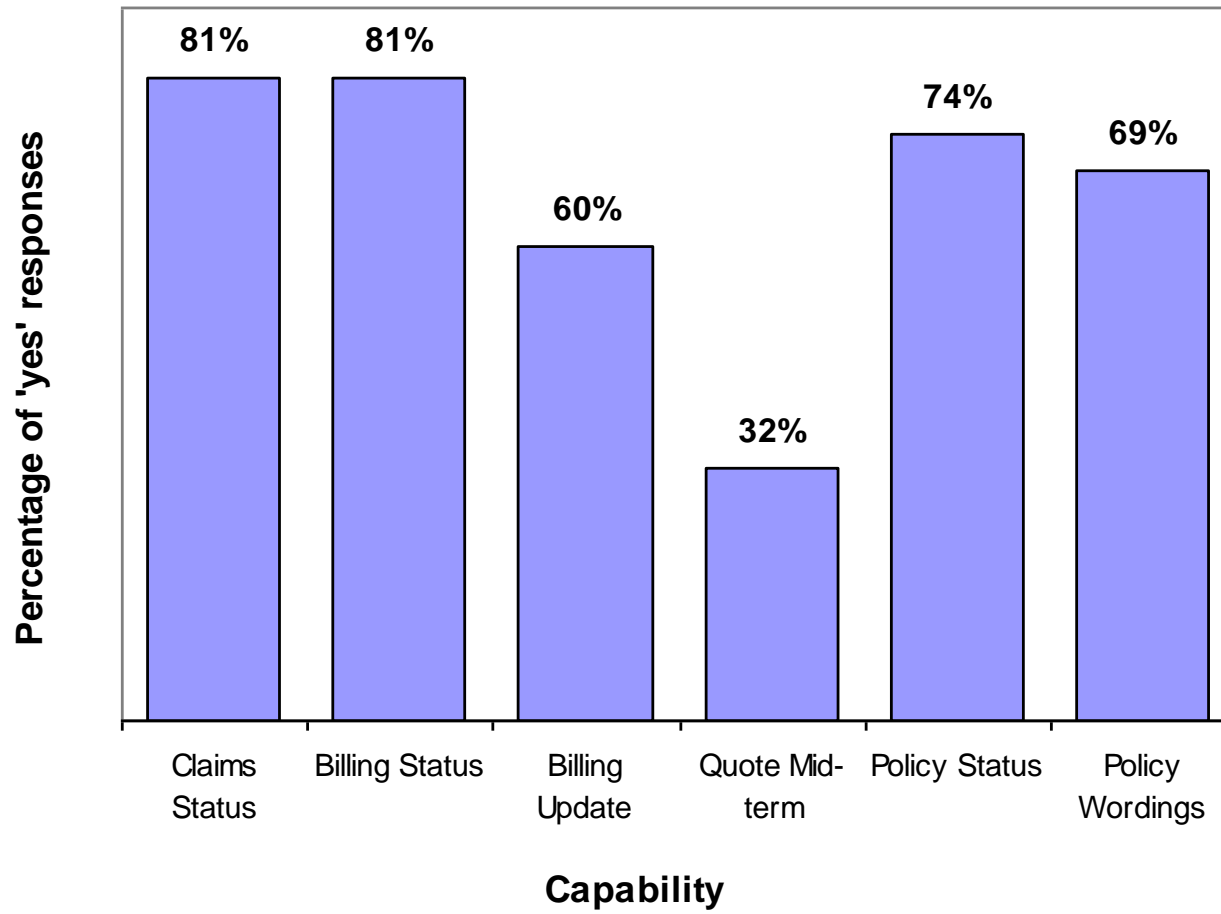
CRT Usage



Numbers reflect RSA brokers who responded to the technology survey.

CUSTOMER CAPABILITY

Broker Attitude Towards Customer Capability



Numbers reflect RSA brokers who responded to the technology survey.

WHAT BROKERS HAVE TOLD US

- Based on our research:
 - The multitude of broker management systems, comparative rating tools, and insurer portals necessitate an integration strategy that can accommodate many different broker workflows
 - Brokers want improved training and support for broker tools to facilitate ease of doing business
 - Business as usual enhancements need to continue to improve existing broker applications such as WebBusiness, EZ-Docs, EDI, and BRAVO
 - Brokers are open to end customer capabilities such as billing/claims/policy status online and electronic policy documents online
 - Brokers want to stay away from insurer portals as much as possible which is where we need to improve for new business and amendment transactions

WHAT WE ARE WORKING ON FOR TOMORROW

- Integration with other systems
 - PowerQuote
 - Keal sigXP
- Green Initiatives leveraging technology
 - Commercial Policy Document Reduction
 - Expansion/enhancement of EZ-Docs
- New Small-Business Product and Quoting Tool
- Supporting industry associations initiatives
 - (i.e. ORBiT, IBAC & CSIO)

QUESTIONS FOR DISCUSSION

1. What can we do to help and encourage brokers to make use of new functionality?
2. How do you feel about the industry's approach to electronic documents?
3. What technology should insurers be focused on?
4. What do you see as the greatest challenge facing brokers in meeting demands of the next generation of consumers?



THANK YOU!