



## CIB Helps Brokers Enhance Customer Service with Fast, Secure Information Access

CIB is an independent South African generalist insurance company that provides administration, servicing and underwriting to different insurance brokers. With more than 100 highly trained employees and 250 brokers across South Africa, CIB handles every aspect of the process — from underwriting and policy issue to claims settlement, recoveries, amendments and endorsements. The company's main clientele are insurance brokers who need to track and manage policies and claims for their customers.

### THE CHALLENGE: PROVIDING BROKERS WITH SECURE, REAL-TIME ACCESS TO INFORMATION

CIB has to manage and process vast amounts of documentation. When a policy is created, renewed or changed, documentation has to be dispatched to record the new data. With more than 12,000 policies — approximately 1,000 of which require amendments each month — CIB was managing a large volume of paper documents.

Historically, CIB would mail information packs, or a broker would visit a local branch to pick up information. Both of these methods were inconvenient and slow, with no guarantee as to when the information would arrive — or even that a broker would receive it. The result was often a two-day delay between requesting and receiving information, which prevented brokers from sharing information with their customers as fast as they would have liked. This meant that a customer might not receive important documents, potentially leaving them uninsured.

What's more, if policy documentation were delayed in the mail, CIB's call centre employees could be inundated with enquiries on the whereabouts of documents. Rather than focusing on more value-added tasks, call centre staff would often have to search through volumes of paper material to find documents that answered the customer query. If the correct documents had not been received, staff would waste time investigating where they were. This time would be better spent improving customer service.

CIB has about 100 brokers across South Africa, concentrated in Gauteng but also in Nelspruit, Durban and Cape Town, with the majority using DSL connections. CIB also has 130 internal users in its Gauteng office. The

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SHANE WILLIAMS,  
IT Manager, CIB

### Key Benefits

- Data accessibility reduced from days to seconds
- Brokers can provide faster and more accurate service
- Increased security of confidential information
- New solution provides complete audit trail

### Applications Deployed

- System A (TIAL Technologies), an insurance management system
- Microsoft® Office
- Adobe Acrobat
- UniPrint

company required a system that would provide brokers and employees with immediate, secure access to information to improve customer service and eliminate the cost, time and risk of relying on the postal service. The applications being accessed included: TIAL Technologies' System A, an insurance management system, and Microsoft® Office applications, including Outlook®, Word and Excel®.

#### CITRIX APPLICATION DELIVERY INFRASTRUCTURE FOR SECURE REMOTE ACCESS

Following a comprehensive review of application delivery solutions, CIB was impressed with the remote access possibilities offered by Citrix Presentation Server™. With support from trusted partner **Smart Axxess Solutions**, an accredited Silver Citrix® Solution Advisor, it began work on implementing the solution in the server room at its Gauteng office.

CIB created and deployed a Web interface to provide its broker clients with immediate access to its CIB Broker Management System database. This solution gives brokers Web-based access to the system so they can search online for policy information, submit new policies, make changes and track claims online. More important, brokers can provide customers with updates on claims in real time. Shane Williams, IT manager at CIB, says: "The Citrix solution has revolutionised the way in which we communicate with our customers, improving both our own service and the service they are able to offer their clients."

With Secure Gateway for Citrix® Presentation Server, CIB has also increased the security of

client data. Previously, the company relied on one Terminal Server, which made it difficult for CIB's IT team to provide each broker with secure access to confidential information. Secure Gateway allows the IT team to quickly establish policy-based access that determines who gets access to what information and when.

#### DATA ACCESSIBILITY REDUCED FROM DAYS TO SECONDS

Faster access to information using Presentation Server gives CIB an advantage over its competitors. Brokers now have instant access to the applications and data they require to better service their own customers. They can simply print and deliver, or e-mail, documents direct to the client. If customers are kept informed in a timely manner, they feel they are getting better service and are more likely to remain loyal.

Williams says: "It was a relatively simple job to create the Web interface, and it has had a substantial impact on us and our customers. Our employees can focus on improving customer service, rather than searching through hundreds of documents for a broker request, then writing an envelope and posting it out. For our brokers, Citrix means instant access to the information they require, which is an incredibly valuable tool."

#### INCREASED SECURITY BENEFITS CUSTOMERS

Like all insurance companies, CIB deals with large volumes of confidential information, both personal and financial. To maintain its reputation, the company needed state-of-the-art security procedures in place. Using Secure

#### Networking Environment

- Citrix Presentation Server™ running on two Intel XEON servers
- Microsoft® Windows Server® 2003
- DSL connections

Gateway gives the CIB IT team confidence that all connections made over the Internet via a browser are 128-bit encrypted and SSL-secured, ensuring that confidential client information accessed by brokers is 100-percent protected. The Citrix solution allows the CIB IT team to define each broker's view, in terms of the application(s) they can access.

"It would be a disaster if a broker accidentally gained access to another broker's information," says Williams. "Secure Gateway is easy to set up and modify and gives us peace of mind. Our brokers and employees have access to all the information they require, but no more than that. However, if we do want to extend access, it's a simple task that takes far less time than in the old Terminal Server environment."

#### NEW SOLUTION PROVIDES COMPLETE AUDIT TRAIL

Brokers can also rely on the Citrix solution to maintain a complete audit trail of changes to a particular policy, and provide their customers with more detailed and inclusive claims reports. "By helping our brokers offer better service to their customers, CIB is able to increase its standing and reputation," Williams says.

**About Citrix Presentation Server:** Citrix Presentation Server™, the #1 application virtualization solution, enables applications to be centrally deployed and managed while providing easy, secure, instant access for any user anywhere. Application business logic runs on a central server, transmitting only screen pixels, keystrokes, and mouse movements — no actual data — via an encrypted channel to users' computers. Presentation Server runs on virtually any platform, from Microsoft® Windows Server® 2003 x64 Edition to Windows Server 2003, Windows® 2000 Server, and UNIX®.