



INNOVATE 2018

Customer Conversations Made SMARTer

Migrating to the Cloud

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Benefits of Cloud

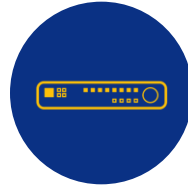


Why Cloud?



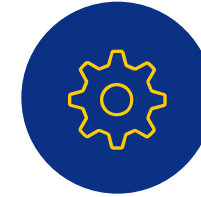
Deployment

- Faster Implementation
- Ease of Maintenance
- Easily Scale to Large Interactive Deployments
- Option to secure PII



Infrastructure

- No need for Operating System, Database, Webserver
- Removes complexities of pre-requisite support for 3rd Party software (e.g. Java)
- Reduced on premise hardware required by Customer
- Lower Total Cost of Ownership



Performance

- Scale up on demand! Mitigates peak-time scaling issues
- Web Based Design and Admin tool ensuring the latest release
- Improved Performance: light weight Appliance model for batch
- Dramatically improved UI and performance

How do we get there?

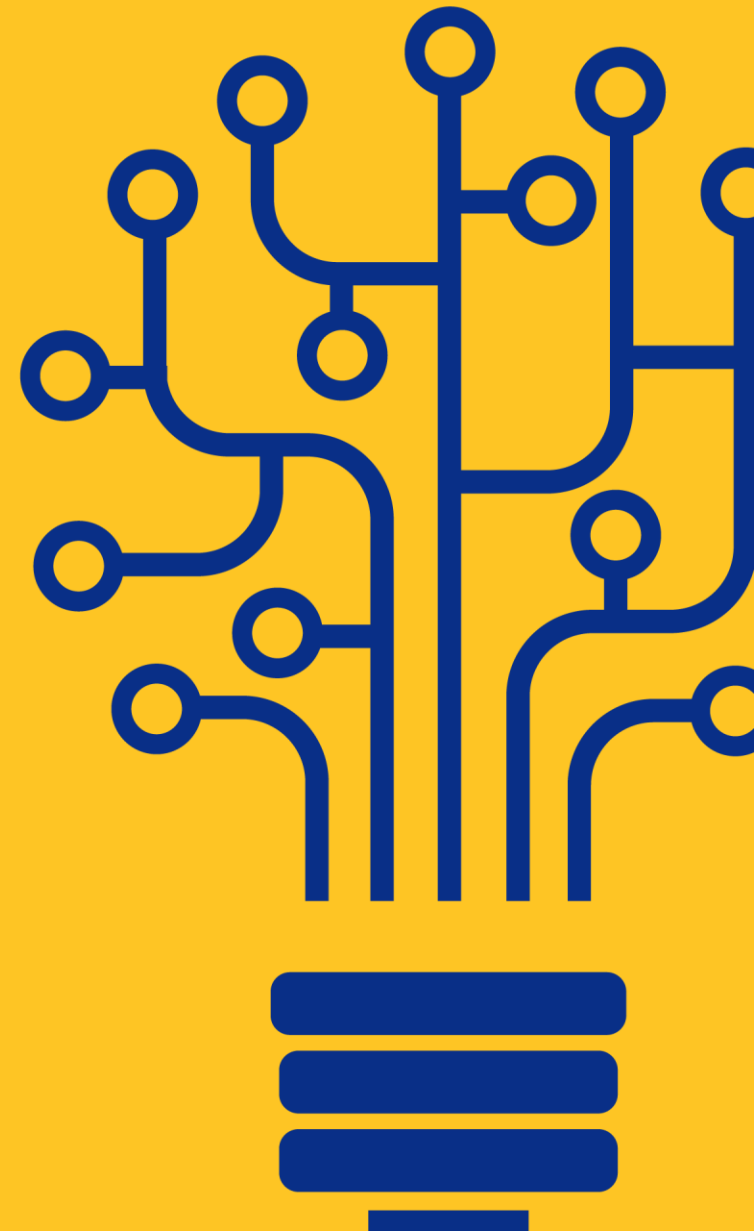
We have a process



- 1 Professional Services Analysis
- 2 Project Planning
- 3 Execution
- 4 Moving Forward

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Analysis



Upgrade Analysis Process



Kickoff

SC Sales Team discusses SmartCOMM™ Upgrade Potential with the Customer



Discussion

SC Professional Services conducts an upgrade discussion with the Customer



Requirements Analysis

Customer fills out Requirements Analysis with the help of PS



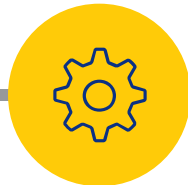
Review

PS reviews Requirements Analysis with the Customer and finalizes the document



CMS Analysis

PS collects and reviews the Customer's CMS for known items for updating



Gap Analysis

PS creates a Gap Analysis document to highlight areas of change



Upgrade Proposal

PS creates an Upgrade Proposal document that will form the basis of a future SOW

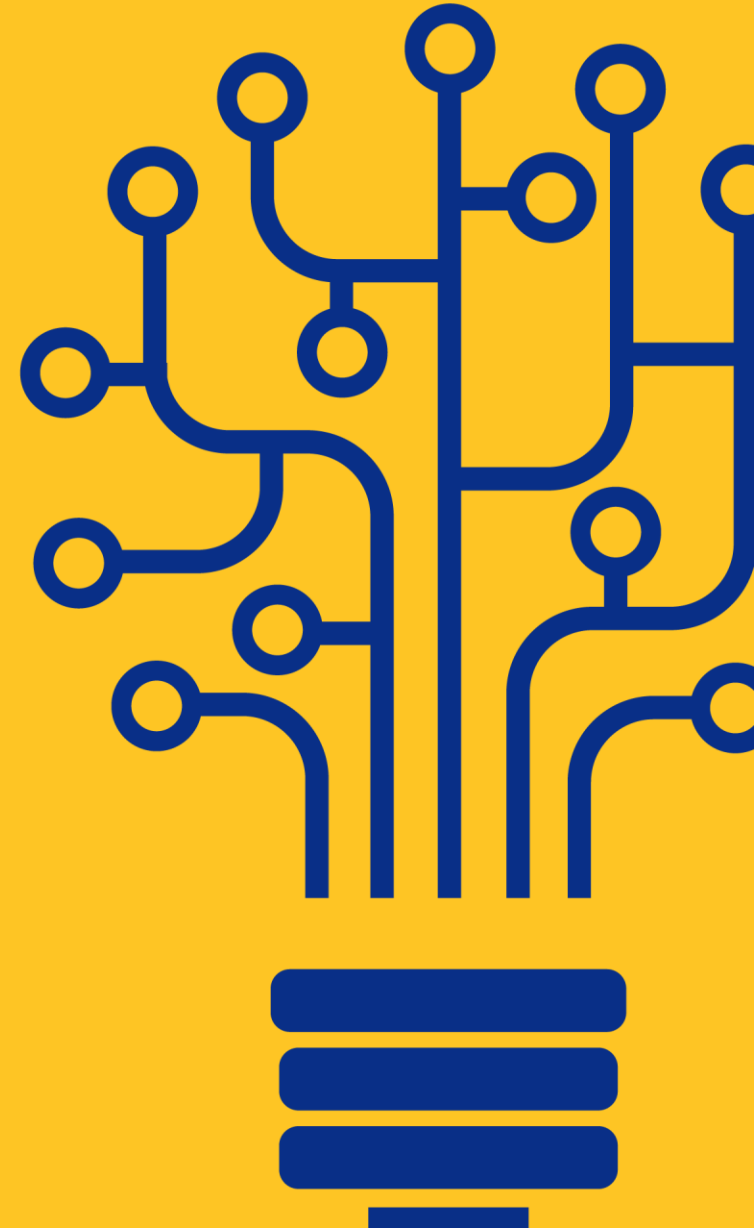


Discussion

SC PS and Sales delivers a short presentation to the Customer regarding the Upgrade Proposal

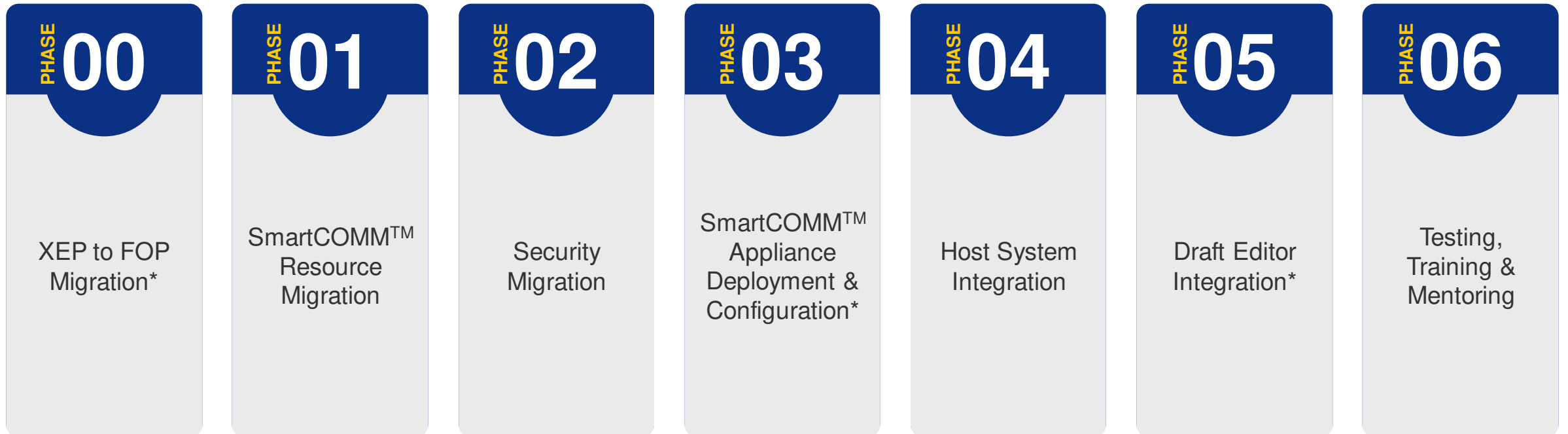
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Planning



Project Phases

The Upgrade Proposal is usually broken into the following sections:



* if necessary



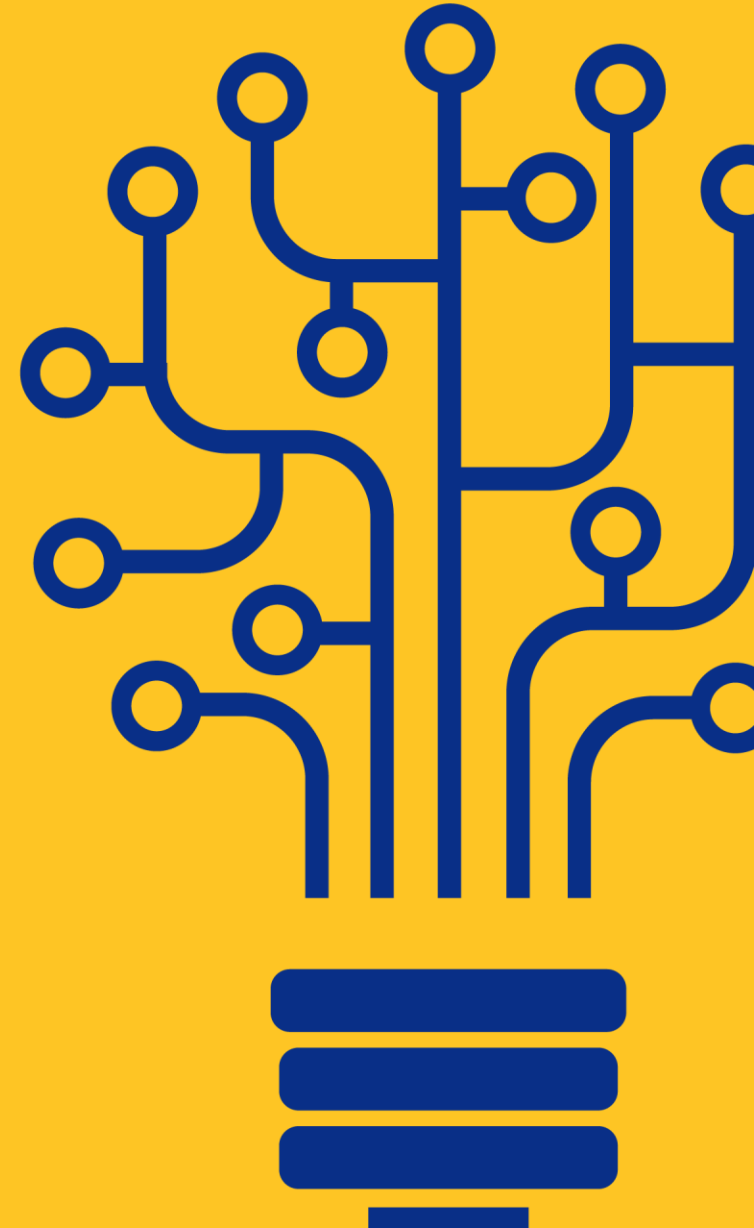
The SC Professional Services team will work with you on an SOW for any tasks you'd like us to take on. Once agreed upon, a project plan utilizing the previous project phases is defined.

Types Of Resources Needed On The Project

- ❖ System Administrator for your current NOW implementation
- ❖ Developer to change integration code
- ❖ Project Manager to oversee project and ensure on-time and on-budget delivery
- ❖ QA Team to run regression testing and ensure communications look as expected
- ❖ Template Authors to fix any issues found during testing

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Execution



Common Changes Made

During your migration to SmartCOMM™, certain resources are commonly updated

OP Config

Change output location to point to shared file server, update reference to fop.xconf



Fonts

All fonts uploaded to CMS and fop.xconf file updated to point to new location

Batch Config

Updates to folder locations for output directories

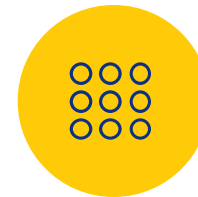
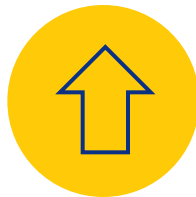


Templates

Replace Dynamic URL with External Content Link, repair any defects found during testing

WebDAV

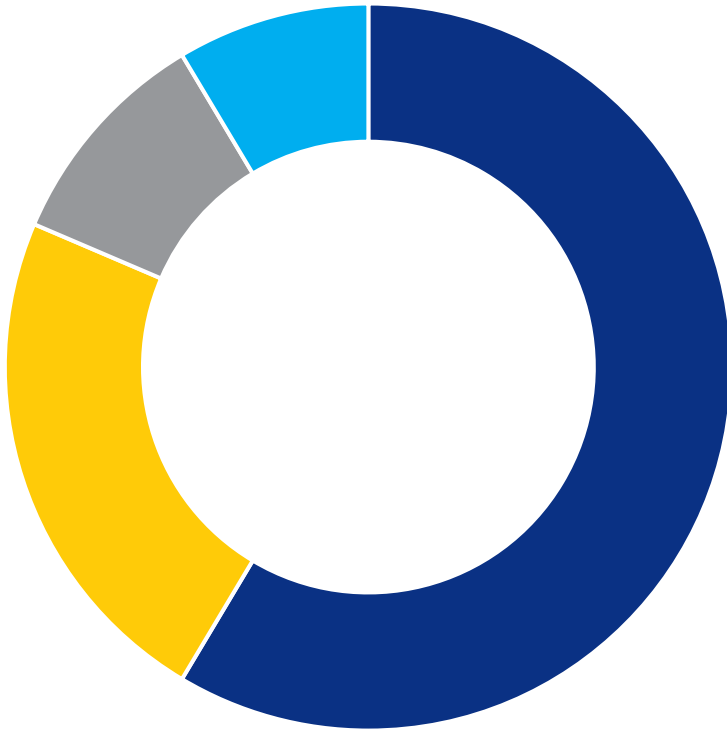
All resources in WebDAV should be uploaded to the CMS



Layouts

Modify th:/// protocol to use cms:///

Before we move on



- 1 Ask how Smart Communications can help with your migration
- 2 Analysis and Planning Ahead save costs in the long run
- 3 Benefits of moving to SmartCOMM™ far outweigh the effort to get there
- 4 We've done it **MANY** times



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Indiana Farm Bureau's Migration to the Cloud

Excellence for **80+** years

A leader in auto and homeowner's insurance and largest writer of farm insurance in the Hoosier state.

- Protecting Hoosiers since **1934**
- Family of companies now includes products for auto, life, home, business and farm.
- Banking and other financial services and products also available
- Home office in Indianapolis
- Local offices in all **92** counties
- **450** agents
- Nearly **1,200** employees throughout IN

Indiana Farm Bureau Insurance – Company Info

The Voice of Insurance

Farmers Work Hard. So We Do Too.

Auto Coverage You Need. In a Language You Know.

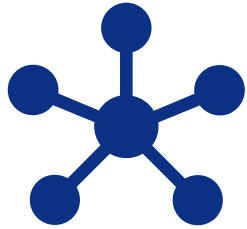
Coverage You Want. For the Home You Love.

Their Rental Property. Your Possessions.

When Your Life changes. We'll Be There.

Rest Assured Your Business Is Our Business.

Indiana Farm Bureau Insurance – Why the Cloud?



Eliminate
managing the
environment



New features/function
targeted to the cloud



Stay current

Our Experience

- Early 2015
 - ✓ Spooling
- Things to review/change
 - ✓ File paths
 - ✓ Windows scripts to shell scripts
 - ✓ SOAP to Restful calls
- Opportunities
 - ✓ Centralized the Smart Communications team
 - ✓ Restructured the CMS

Our Setup

- Tenancy
 - ✓ 1 Prod & 4 Non-Prod
- Appliances
 - ✓ 3 Prod
 - 1 for Life
 - 1 for Auto, Home, Commercial & Farm
 - 1 for Interactive & On-Demand
 - ✓ 4 Non-Prod

Indiana Farm Bureau – Batch Cloud Conversion

Cloud Batch Volume			NOW Batch Volume		
	<u>Daily</u>	<u>Monthly</u>		<u>Daily</u>	<u>Monthly</u>
CRM Marketing Postcards	1,036	20,726	Auto/Home	7,924	158,480
EAS Checks/Letters	1,534	30,686	Life Contracts	110	2,208
Life Invoices	1,170	23,408			
Life Correspondence	737	14,732			
Commercial	1,566	31,312			
NPD	0	88			
Totals	6,043	120,952		8,034	160,688

Indiana Farm Bureau Insurance – Life in the Cloud



Performance improvements



Upgrades are a non-event



Planned Outages



Generic error messages

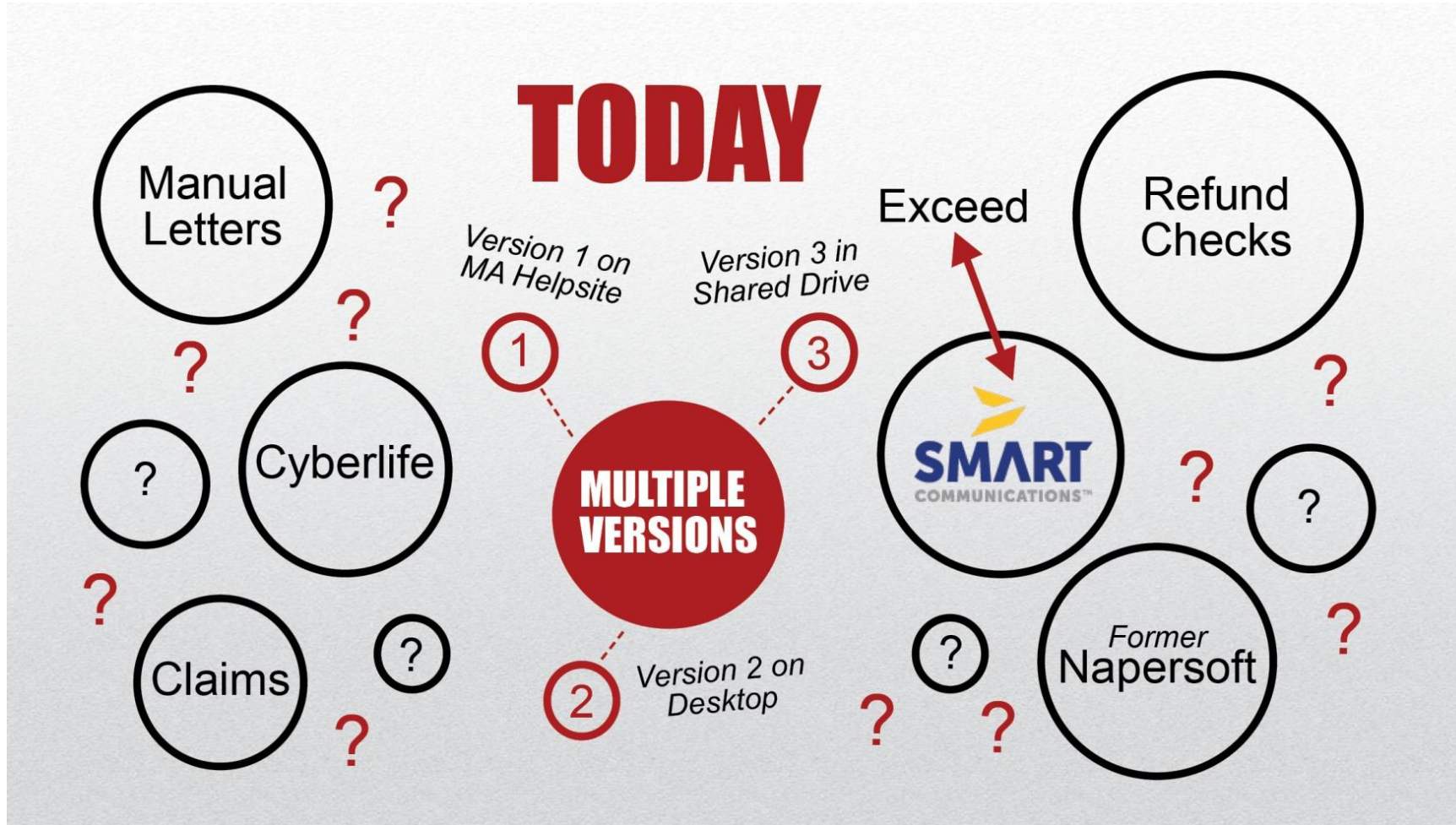


Limited access to log files



Usage Statistics

Indiana Farm Bureau Insurance – Cloud Benefits



Interactive / On-Demand Correspondence (Draft Editor & Collaborate)

445 Separate Correspondence Identified

- Need for clarity and consistency
- Outdated design
- Jargon-heavy
- Duplication
- We are one company, but don't always present ourselves that way

Life Anniversary Statement-Before

• FILE COPY •

580
5815
PAGE 1

UNITED FARM FAMILY LIFE INS COMPANY
1-800-723-3276 PO BOX 1250 INDIANAPOLIS, IN 46206
POLICYHOLDER STATEMENT FOR JANUARY 31, 2016 THROUGH JANUARY 31, 2017

REPORT DATE: 01-31-17

INSURED:
TRESTER, IXJUGLAS L
7956 E LAUGHERY CREEK RD
AUDRA IN 47001

AGENT:
UNASSIGNED
626 N. HIGH ST
RISING SUN IN 47040

POLICY NUMBER: 1062427
ISSUE DATE: JANUARY 31, 2007
ISSUE AGE: 51
MATURITY DATE: JANUARY 31, 2051
20-YEAR SMART PLAN PREMIUM FOR COVERAGE MII

FACE AMOUNT: \$100000
MODE PREMIUM: \$315.64/0
PAID TO DATE:APRIL 30, 2017

PAYMENT ACTIVITY

DUE DATE	ENTRY DATE	AMOUNT
01-31-16	02-04-16	315.64
04-30-16	06-03-16	315.64
07-31-16	08-03-16	315.64
10-31-16	10-27-16	315.64
01-31-17	01-25-17	315.64
TOTALS		1,578.20

OTHER COVERAGE:
Fm IXJUGLAS L TRESTER
\$0.00 OF 20-YEAR SMART PLAN PREMIUM FOR CASH VALUES MII
\$0.00 OF TERMINAL ILLNESS ACCELERATED BENEFIT RIDER.

THE CASH SURRENDER VALUE OF YOUR POLICY ON JANUARY 31, 2017 IS \$1,821.00.
THIS POLICYHOLDER'S STATEMENT IS NOT FOR TAX REPLYING PURPOSES. THE STATEMENT REFLECTS POLICY ACTIVITY
OVER THE LAST 12 MONTHS AND FOR YOUR INFORMATION ONLY.

FACE AMOUNT -- DOES NOT INCLUDE OPTIONAL BENEFITS OR RIDERS AND WOULD BE REDUCED BY THE AMOUNT OF ANY
OUTSTANDING POLICY LOAN.

*** END OF STATEMENT ***

Life Anniversary Statement-After

Annual Statement ANNUAL RENEWABLE TERM

**INDIANA FARM
BUREAU INSURANCE***
PO Box 1250, Indianapolis, IN 46206-1250
www.infarmbureau.com

Policy Number 0123456
Policy Date 03/29/2011
Policy Period 03/29/2016 through 03/29/2017
Insured WILLIAM BUREAU

For additional information, contact your agent:
RICHARD B COMMEVILLE
835 N GREEN ST
BROWNSBURG IN 46112
(317) 111-1111
Richard.Commeville@infarmbureau.com

WILLIAM BUREAU
3705 FARM ST
INDIANAPOLIS IN 46206

 Call Us
1-800-723-3276

Policy Summary as of 03/29/2017

	Death Benefit	Final Expiry Date	
Base Coverage	\$25,000.00	88/88/8888	
Death Benefit: Does not include additional benefits or riders and would be reduced by the amount of any premium due and unpaid.			
Additional Benefit(s)	Covered Insured	Expiry Date	
Waiver of Premium	WILLIAM BUREAU	88/88/8888	
Additional Rider(s)	Covered Insured	Death Benefit	Expiry Date
Child Rider	DEB BUREAU JOHN BUREAU	\$10,000.00	88/88/8888

Primary Beneficiary(ies)

PAM BUREAU, PENNY BUREAU, MARTHA BUREAU

Premium Information as of 03/29/2017

Quarterly Premium Amount: \$387.53 **Premium Amount Annualized:** \$1,550.12
Other Payment Options Available: Monthly EFT (Electronic Funds Transfer), Semi-Annual or Annual
Monthly EFT: \$128.18 **Semi-Annual:** \$767.61 **Annual:** \$1,490.50

Activity Summary for Period

Correspondence Portal (bridge)

- View and select correspondence by LOB and user role
- Select pre-approved language to be included in a communication and send without additional approval
- Modify pre-approved language on communication templates resulting in new templates for business areas
- Collaborate on changes to customer communications
- Send communications utilizing the customer's preferred method of contact
- Capture communication usage statistics and customer interactions with the communication

Indiana Farm Bureau Insurance – Correspondence



Welcome, Michael Brown

Filter by title

List of Documents

Draft Editor

Life Split Tax Year Correction Letter

SAMPLE

DRAFT

Life COFA First Renewal Notice Letter

SAMPLE

DRAFT

Life Annuity Start Date Notification Letter

SAMPLE

DRAFT

Life Annuity Payout Contract End Notification Letter

SAMPLE

DRAFT

Life Annuity County Check Delivery Letter

SAMPLE

DRAFT

Life CAP Returned Mail Letter

SAMPLE

DRAFT

Life IND Returned Mail Letter

SAMPLE

DRAFT

Life CAP Ownership Change Letter

SAMPLE

DRAFT

Life IND Ownership Change Letter

SAMPLE

DRAFT

Indiana Farm Bureau Insurance – Correspondence



Welcome, Michael Brown

SEND TO PRINT SERVICES

List of Documents

Draft Editor

The screenshot displays a document viewer interface. At the top left of the document is the logo for Indiana Farm Bureau Insurance, with the text "INDIANA FARM BUREAU INSURANCE" and "P.O. Box 1250 | Indianapolis, Indiana 46206-1250". Below the header, there are several lines of redacted text, represented by grey boxes. A date stamp "[April 19, 2018]" is visible on the right side of the document. In the center, there is a "Page" indicator with a document icon and another "[April 19, 2018]" date stamp, followed by the word "NAME". A prominent red horizontal bar contains the text "CONTACT US". Below this bar, the text "Your Agent:" is followed by a list of contact information, each preceded by a lock icon: "Lucas, Sean", "875 N. Lincoln Rd", "P O Box 186", "Rockville, [IN] [47872]", "(765) 569-3191", and "Sean.Lucas@infarbureau.com". At the bottom of the document, the website "www.infarbureau.com" is listed. The interface includes navigation icons at the top of the document area and a vertical scrollbar on the right.

Indiana Farm Bureau Insurance – Benefits

- Utilize customer preferred method of contact
- Lower postage and processing costs
- Reduce staff dedicated to creating manual customer communications
- Reduce cost of mass changes
- Empower business areas to make real-time changes
- Store, maintain and manage customer communications in a controlled, automated environment





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