



**DBV\*Solutions\*Inc.**

*Innovative Business Process Reengineering  
Leading-edge Technology & Outsourcing  
Risk Mitigation and M&A Integration Consulting*

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# The Ingenuity to Foster Insurance Innovation & Accelerate Transformation



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***DBV Solutions, Inc***




***[www.DBVSolutions.com](http://www.DBVSolutions.com)***

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## KEY BROKER CHALLENGES & IMPLICATIONS:

AREA	CHALLENGES	IMPLICATIONS
<b>Technologies</b> 	<ul style="list-style-type: none"><li>• Use of different P&amp;C agency systems (AMS) with many databases across multiple regions and offices</li><li>• Lack of a centralized document management repository / process</li><li>• Multiple Benefits systems and databases</li><li>• Inconsistent AMS add-in tools</li><li>• Inconsistent use of the AMS or systems</li></ul>	<ul style="list-style-type: none"><li>• Lack of consistent business, financial and accounting reporting &amp; functionality</li><li>• Challenging systems integration</li><li>• Difficult merger partner integrations</li><li>• Costly system maintenance and administration</li><li>• Lack of enterprise-wide client data visibility</li><li>• Inconsistent data and systems use</li></ul>
<b>Processes, Workflows &amp; Tools</b> 	<ul style="list-style-type: none"><li>• Non-standard insurance service, as well as finance and accounting and Benefits processes, workflows &amp; standards</li><li>• Varying templates &amp; tools</li></ul>	<ul style="list-style-type: none"><li>• Professional standards and corporate audit challenges</li><li>• Inconsistent client experience</li><li>• High servicing cost</li></ul>
<b>Type of Work &amp; Org</b> 	<ul style="list-style-type: none"><li>• Effective use of specialty businesses across regions</li><li>• Profitability of small business and personal lines</li><li>• Seamless client service across regions</li><li>• Lacking change management and training competencies</li></ul>	<ul style="list-style-type: none"><li>• Inability to effectively leverage producer and service resources across regions</li><li>• Declining revenues and increased costs</li><li>• Inconsistent client experience</li><li>• Inconsistent use of tools and systems</li></ul>

## ACCOMPLISHMENTS *(Sample Recent Broker Engagement)*

- Created consistent P&C and Benefits processes, that aligned with Agency System (AMS) workflow best practices; enabled seamless system workflow design and configuration in advance of a pilot to test the configuration
- Crafted vendor selection approach and processes, and managed the Agency Management System selection scoring between Applied Systems and Vertafore
- Provided comprehensive change management and risk management leadership and input to the PMO, effectively managing risk and on-time, on-budget delivery
- Eliminated paper flow, adopted paperless processes, and created selection criteria and scoring for a standardized document management solution
- Segmented the P&C and Benefits business to enable standardized, more efficient, and effective servicing by focusing on client needs, revenue size and deliverables



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## ABOUT US

In business since 2004, DBV Solutions (DBV = *Driving Business Value*) is a veteran-owned, international management consulting firm providing advisory, operational improvement & project management services to companies across multiple industries, with a **strong specialty in the Insurance industry**.

Complementing a company's expertise, DBV leverages its **experienced professionals** with deep functional expertise and **proven track records**, along with its world-class partners, to drive change even under the most adverse conditions.

We **differentiate** ourselves in the marketplace by **our understanding of the insurance business** – our principals are licensed brokers *and* efficiency experts. We have a strong network of partner firms with world-class technology solutions or leading-edge business process outsourcing competencies to enable competitive and reasonable client solutions.

## SERVICES PROVIDED

- Renewal Lifecycle and New Business Lifecycle Improvements (*Margin & Retention Improvements*)
- Small Business Customer Profitability Improvements (*Margin & Retention Improvements*)
- Merger Partner Due Diligence and Integration (*Initial Due Diligence through Full Integration*)
- Sales Channel Improvements (*Organic Growth Increase and Retention Improvements*)
- Agency Management System Implementation and Improvements
- System Automation and Implementation
- Customer Self-service Innovations and Implementations (*Client Satisfaction Improvements*)
- Paper Flow and Redundancy Reduction (*“Going Paperless”*)
- Productivity and Throughput Improvements (*Cost Reduction*)
- Real Estate Consolidation and Rationalization (*Cost Reduction*)



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## OTHER INSURANCE SPECIALTIES

- Carriers
- Brokers
- MGAs
- Intermediaries

## WHAT OUR CLIENTS SAY



“Great partnership,  
and best partner to  
be selected for this  
project”  
**COO, Top 20 Broker**



“We could not have  
accomplished this  
without DBV  
Solutions. Fantastic  
job!”  
**CEO, Top 20 Broker**