

# ABD Data and Systems Infrastructure

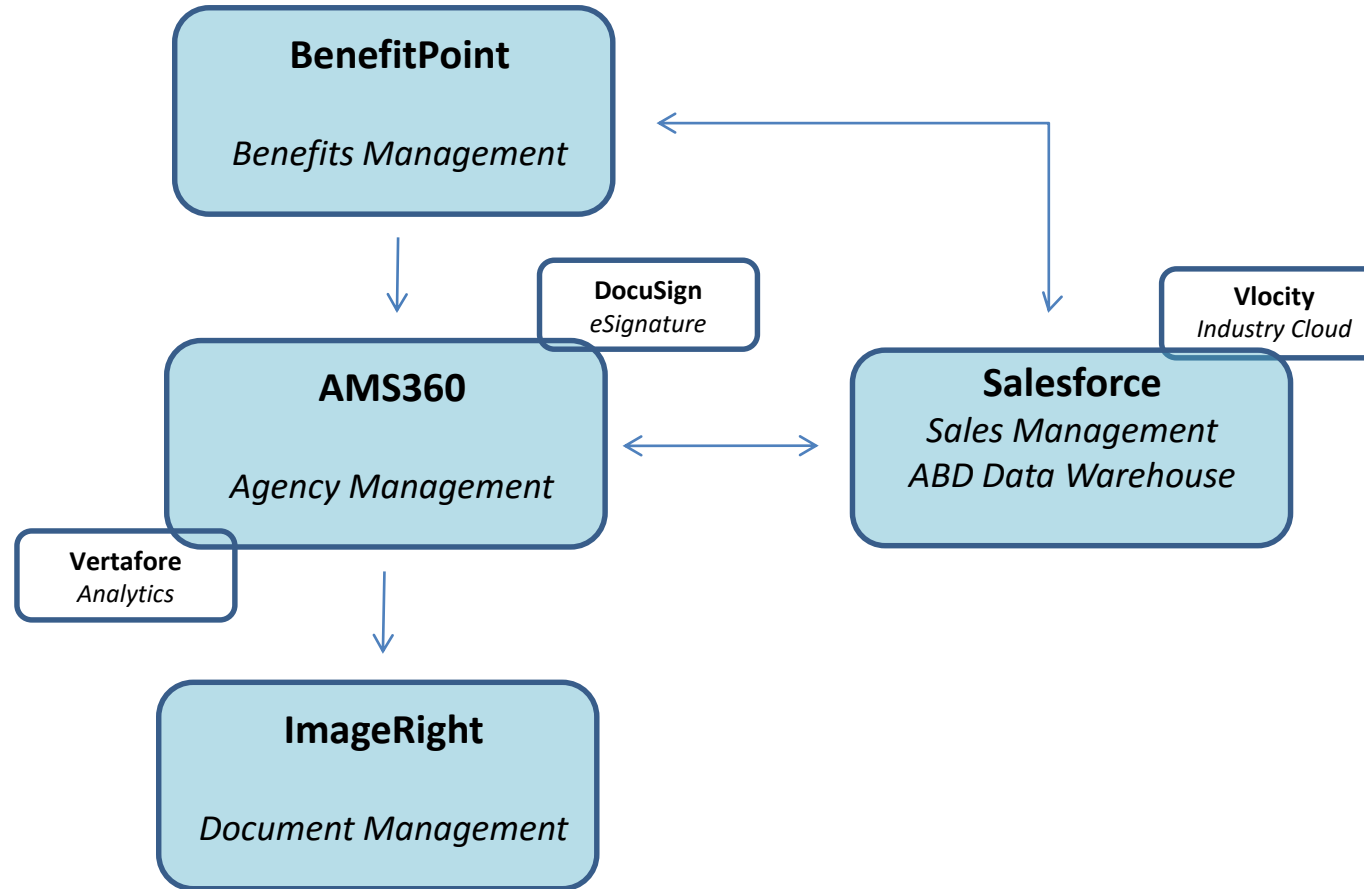
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Chief Information Officer

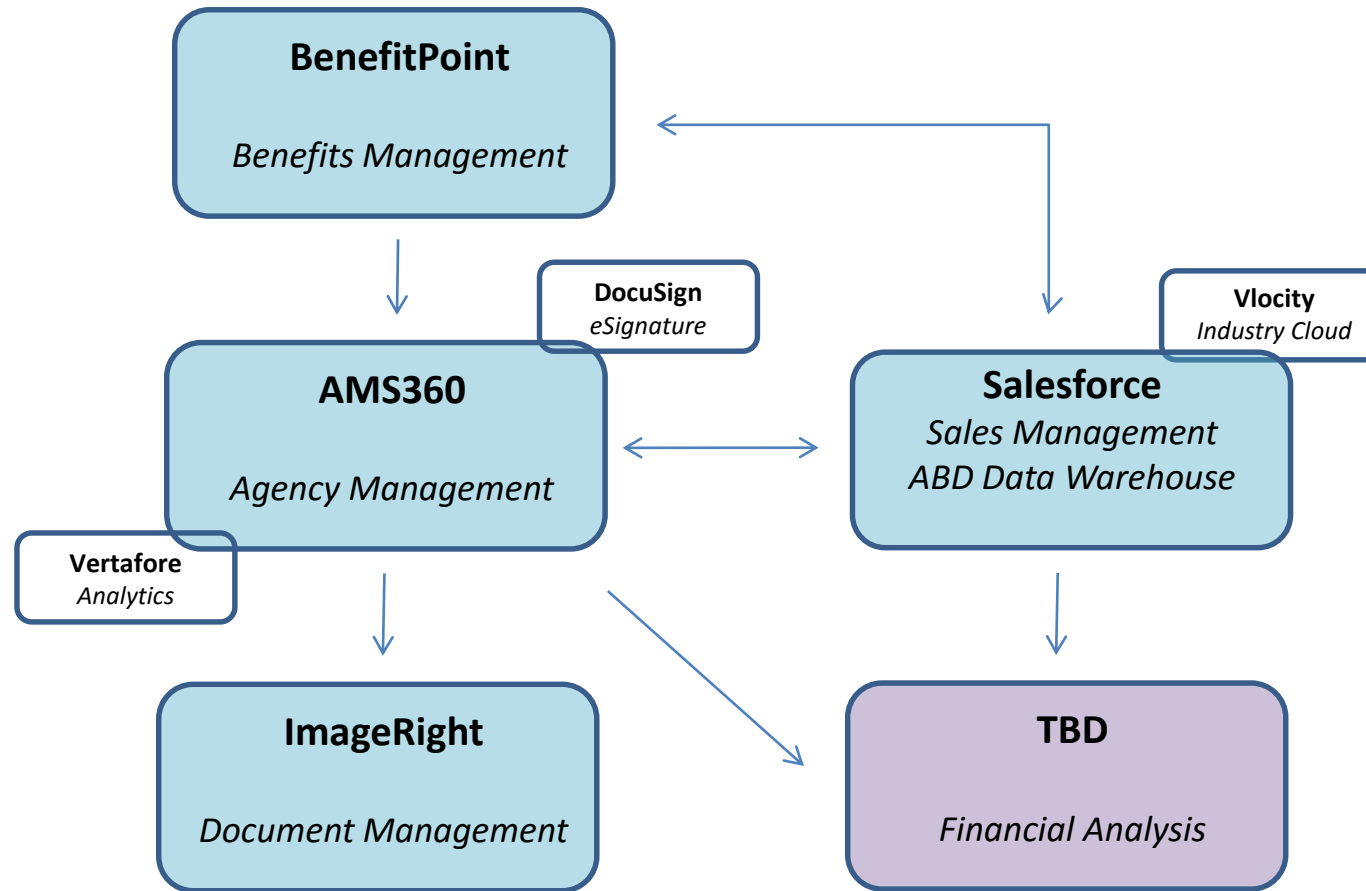
June 14-16, 2017



# ABD Integrated Platform: Business Applications



# ABD Integrated Platform: Business Applications



# Salesforce: Sales and Marketing

- New business development
- Prospecting
- Contact management
- Campaigns (Marketo)
- Dashboards and reports
- Salesforce1 mobile



# Salesforce: Platform

- Salesforce Shield
  - Full data encryption at rest
  - Field-level auditing
  - Field-level history
- Sales Cloud
  - Producers and executives
- Community Cloud
  - General staff

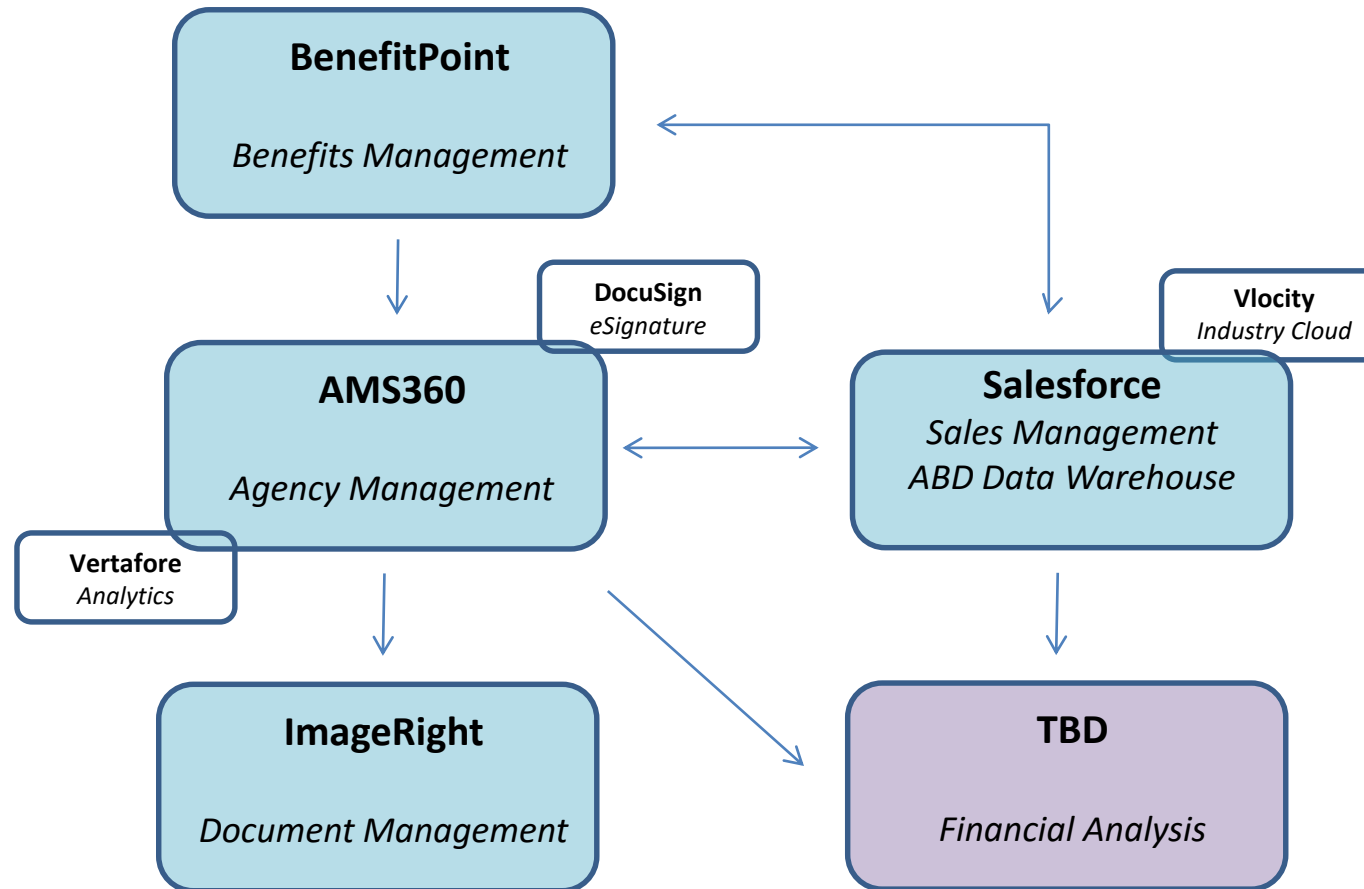


# Salesforce: Platform

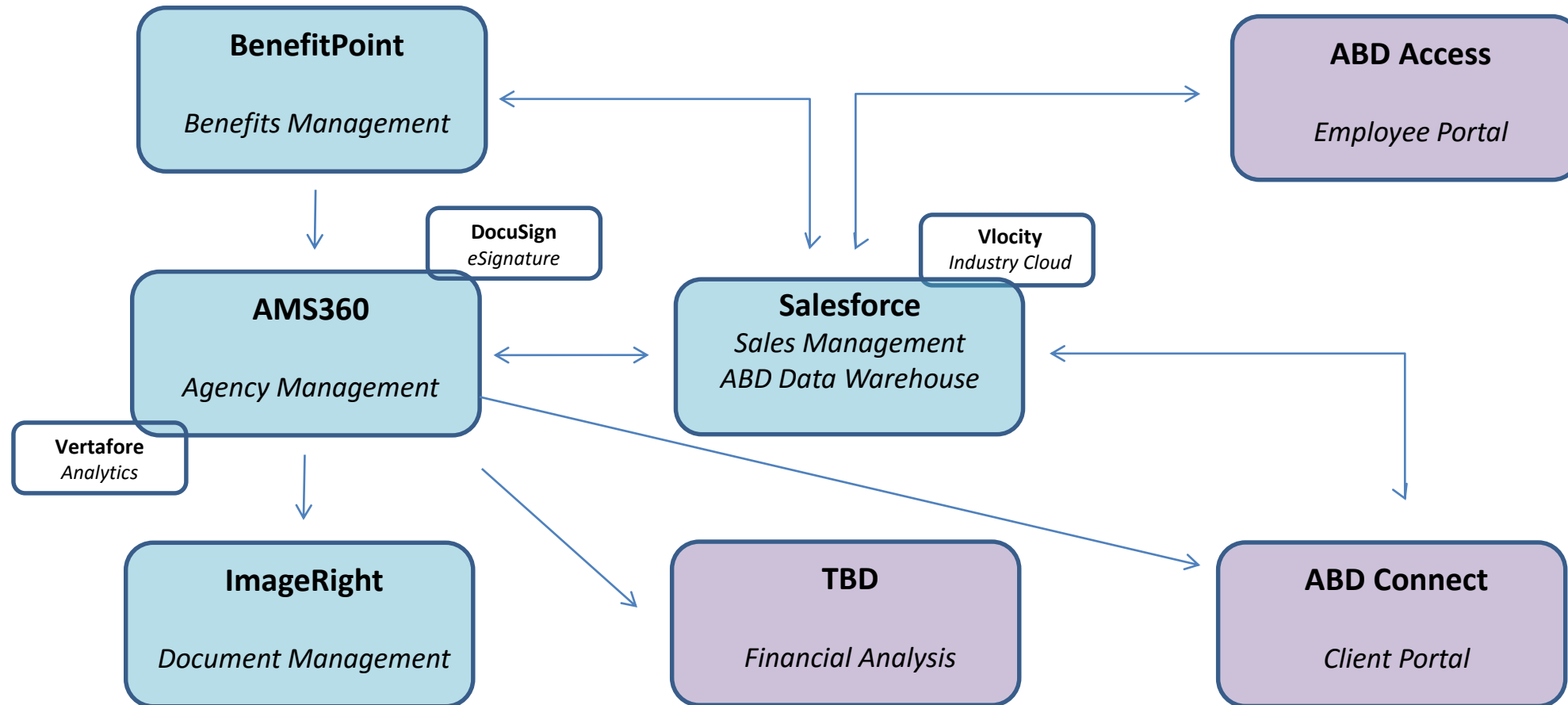
- Vlocity
  - Contact relationships
  - Customer story
  - Data collection through OmniScript and DataRaptor
- Community Cloud
  - Client portal content: ABD Connect
  - Employee portal: ABD Access



# ABD Integrated Platform: Business Applications



# ABD Integrated Platform: Enterprise Applications





# ABD Connect

*Powered by Vertafore Client Portal and Salesforce Community Cloud*

- Home/Welcome/Overview
- Policy summaries
- Auto ID cards
- Certificates (view and self-service)
- Documents
- General P&C Claims
- EB Compliance
- Cyber Liability Hub
- HR On-Demand
- HR 360
- Shared HR
- “Shared Economy” Claims
- New business/renewal applications
- Clinical Trials Submissions
- Global Benefits Admin
- Global P&C Admin
- Private Client Services
- Net Promoter Score Surveys



# ABD Access

*Powered by Salesforce Community Cloud*

- **ABD Team/Employee Directory**

- Self-service updates
- Work/Love/Play bio

- **Benefits Info Center**

- **Help Desk**

- View all open tickets
- Log a new ticket

- **Client Lookup**

- View all active plans and policies
- View rollup of all contacts
- One-click link to ImageRight files

- **Client Action**

- Track time
- Record lost business

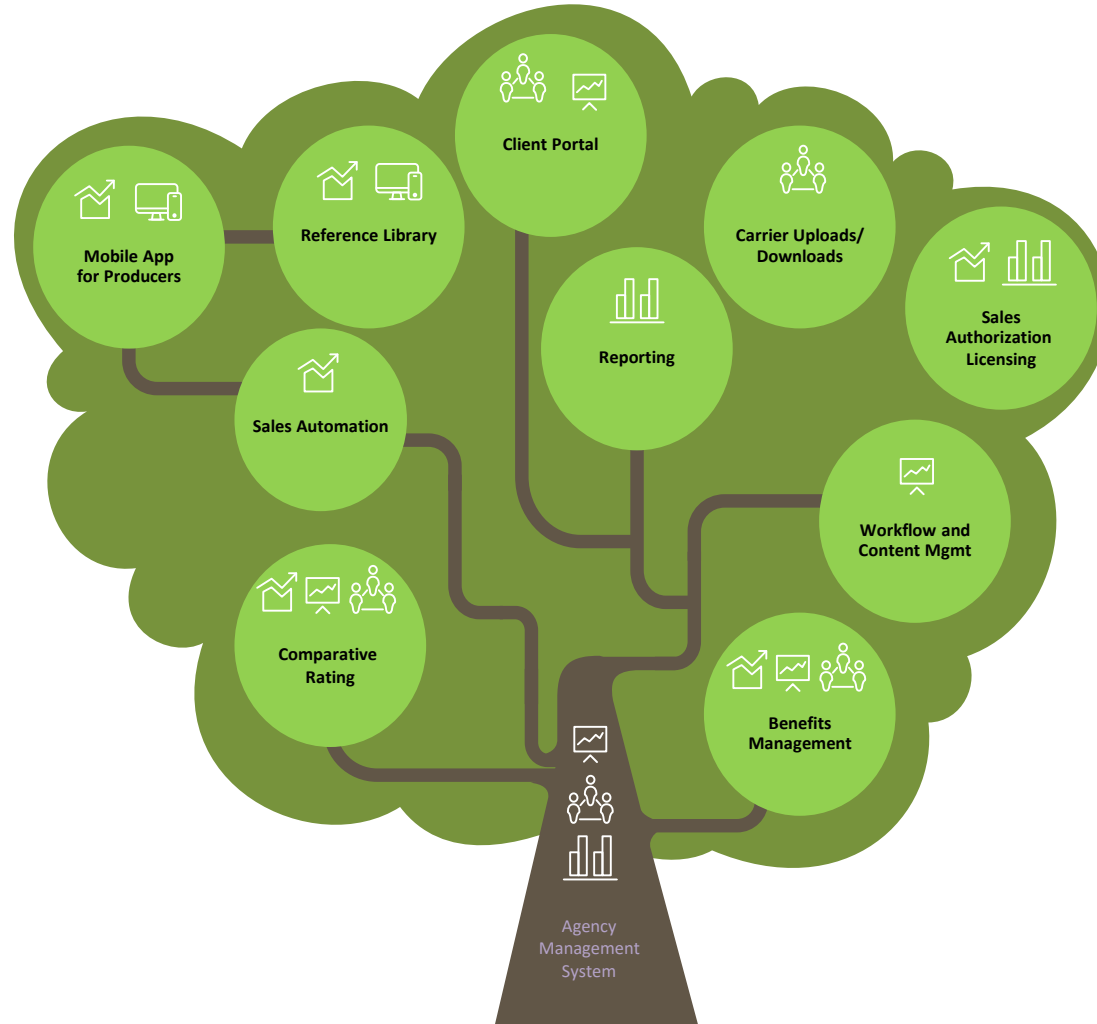
- **Custom Applications**






- ABD Ideas
- Clinical Trials requirements
- Global EB and P&C requirements
- Global EB policy tracking
- Vessel tracking/certificates
- Shared Economy claims
- Personal client questionnaire
- New business applications
- Renewal workbook
- HR employee actions
- Employee tech inventory management
- NPS tracking
- Lost business reporting
- Time tracking (EB services, claims)



# Agency Management Systems

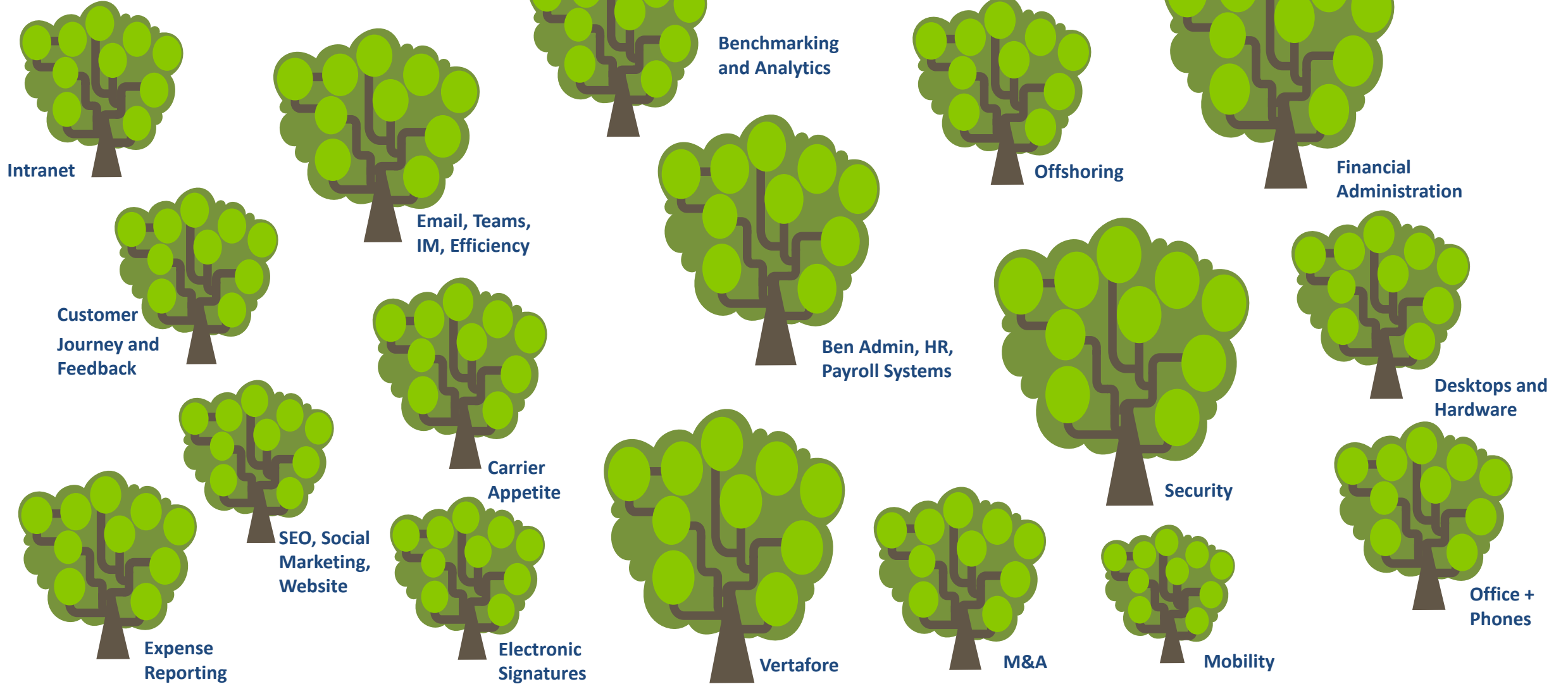
*Powered by Vertafore*



-  Increase Revenue
-  Increase Profitability
-  Retain Existing Customers
-  Manage Your Business
-  Anywhere, Anytime Access



# The trees



# See the forest for the trees



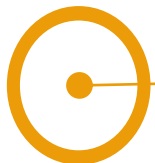
## IaaS

Infrastructure as a Service



## DaaS

Desktop as a Service

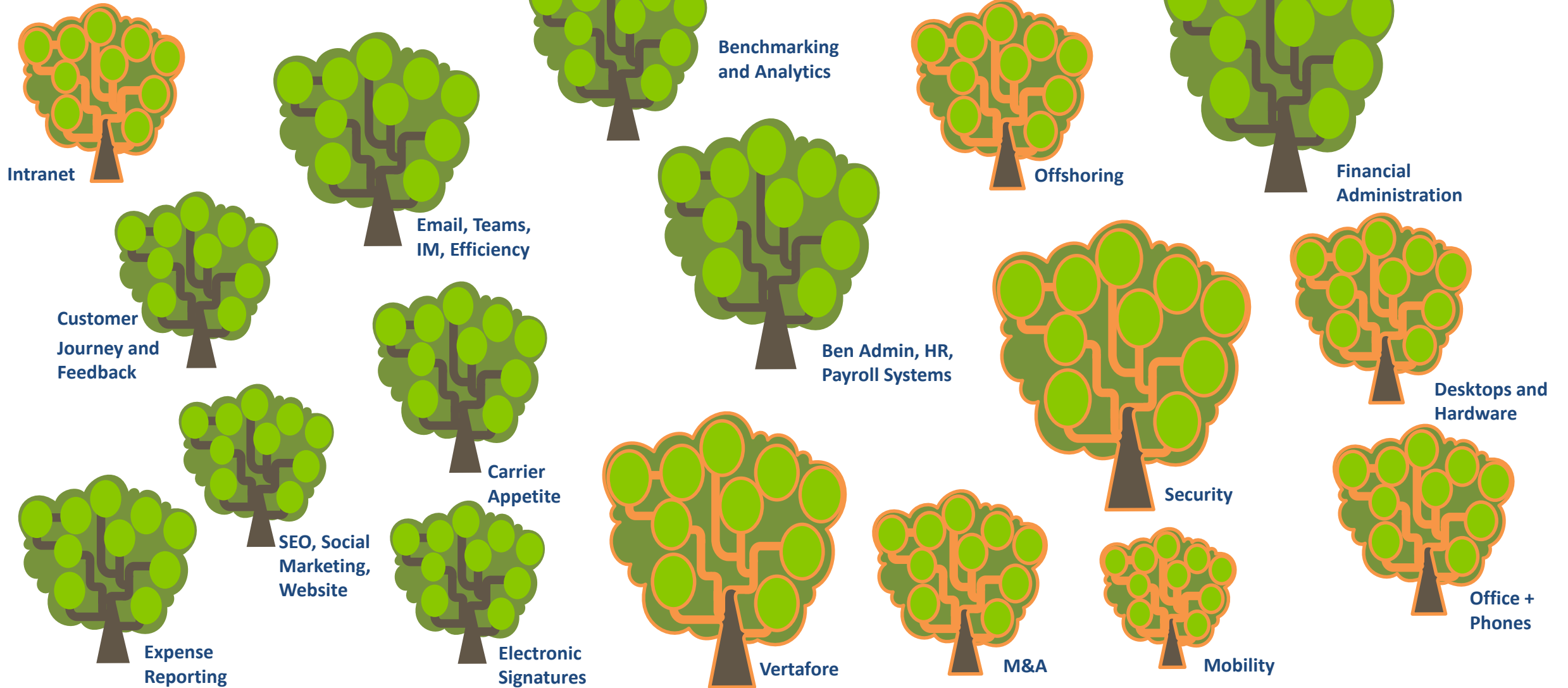


## MSP

Managed Services Provider



# The forest



# 100% cloud infrastructure: savings

*Powered by Amazon*

Item	Savings	Notes
Local hourly two-tier IT support	\$230,000	\$300K offset with local EE hire
Server purchases and upgrades (3 years)	\$60,000	
Extended life of laptops (3 years)	\$24,000	
Cloud backups (annual)	\$10,000	
VPN, local AD, desktop encryption	\$30,000	



# 100% cloud infrastructure: benefits

*Powered by Amazon*

Item	Item
Zero local footprint	Flexibility and mobility for users
Continuous performance upgrades	Fast onboarding of new employees
Continuous feature upgrades	Efficient support of offshore teams
Full encryption of all volumes	Disaster recovery and virus protection
Convenience of “computer in the cloud”	Predictable IT costs
Employee effectiveness	Simple upgrades of desktop applications
Management of group policy	Desktop audits and compliance





# Data integrity

- Integrations require close oversight of error queues
  - Employees are often unaware of negative impacts
- Hoover's company lookup for SIC/NAICS
- Program Manager for internal user licensing
- Data Quality Analyst for client data compliance
- Single, integrated client record
  - AMS360 ID in all systems



# Single, integrated client lookup

*Powered by ABD Access*

- One location for 360-degree view of client
  - Active policies across all LOBs
  - Active and inactive contacts
  - YTD commissions received
  - Internal services time tracked
  - Lost business recorded
- *Quick demo*



# Enterprise analytics

*Powered by AMS360 Analytics*

- Agency performance
- Agency trends
- *Quick demo*



# Questions

