

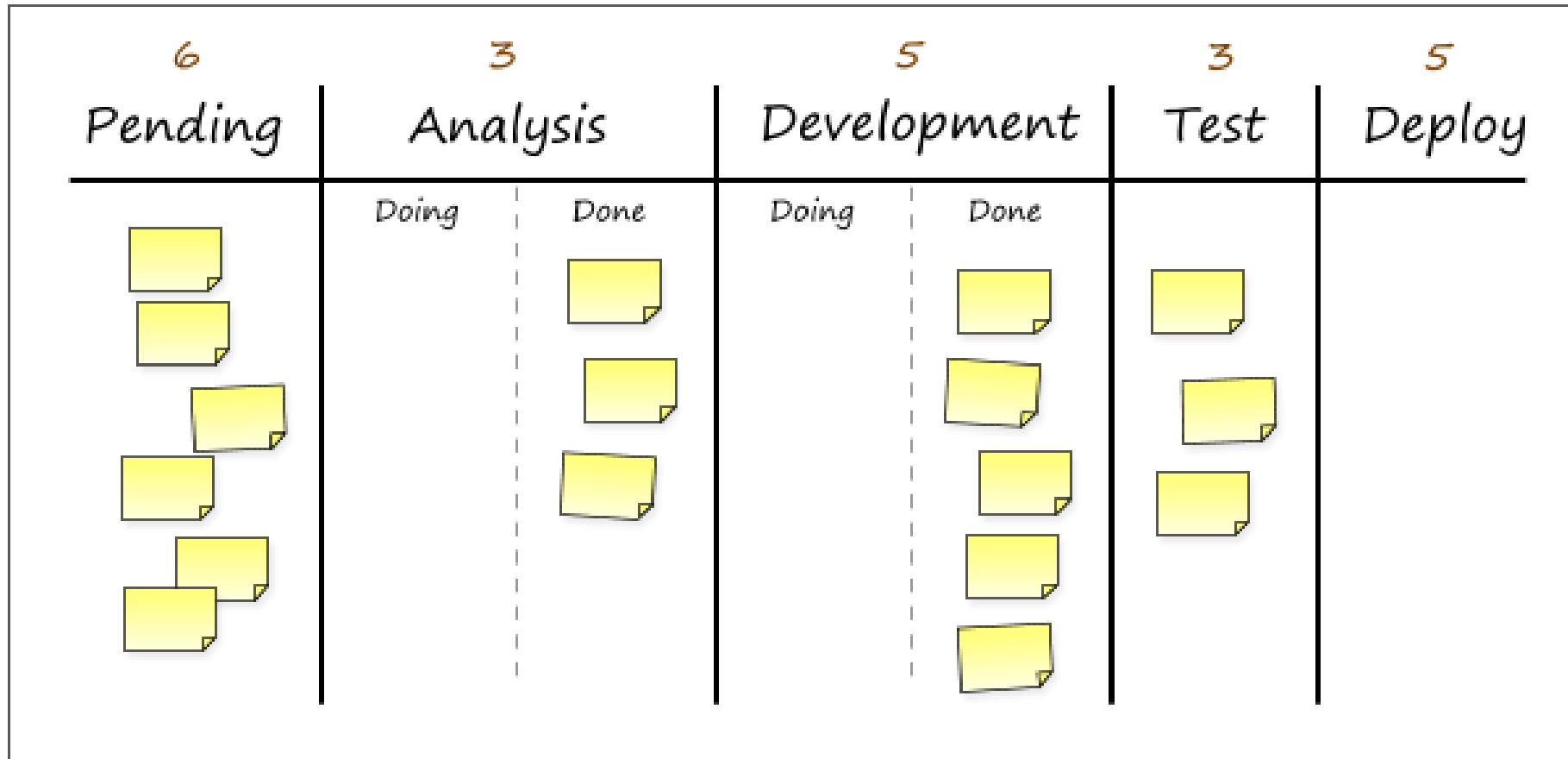
Getting Rid of Emails – Modern Underwriting Workflow Tools

Kevin Huang
March 2017

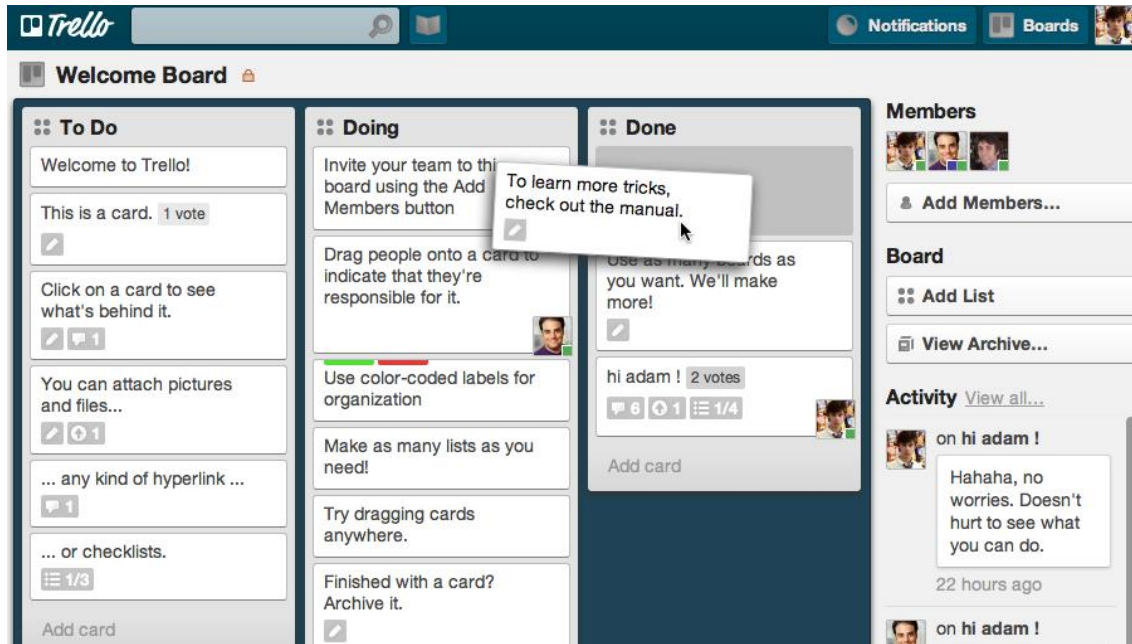
Introduction

- An easy-to-use underwriting workflow tool can:
 - Increase efficiency
 - Enhance transparency
 - Mitigate key-employee risk
 - Create positive customer experience
- Opportunities to modernize the legacy underwriting workflow management systems
 - Rapid development in technology
 - Broad adoption of web-based solutions
 - New ways of communication through messaging
- This presentation will demonstrate the key features of several applications widely used by the software development industry and brainstorm better ways to manage underwriting workflow

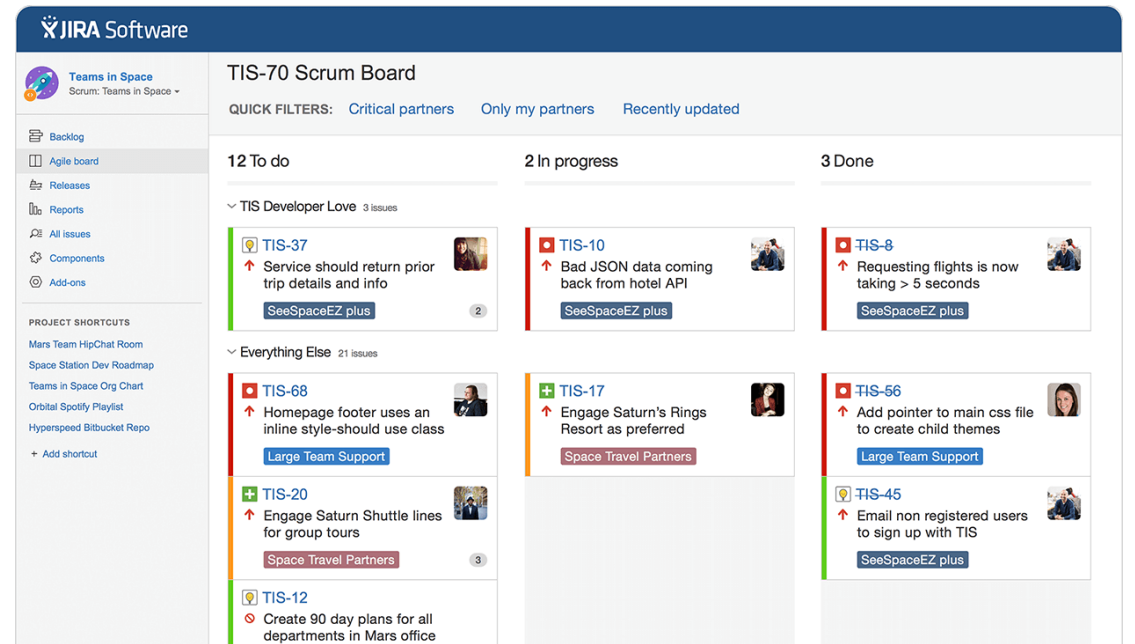
Kanban Board



Trello/Jira

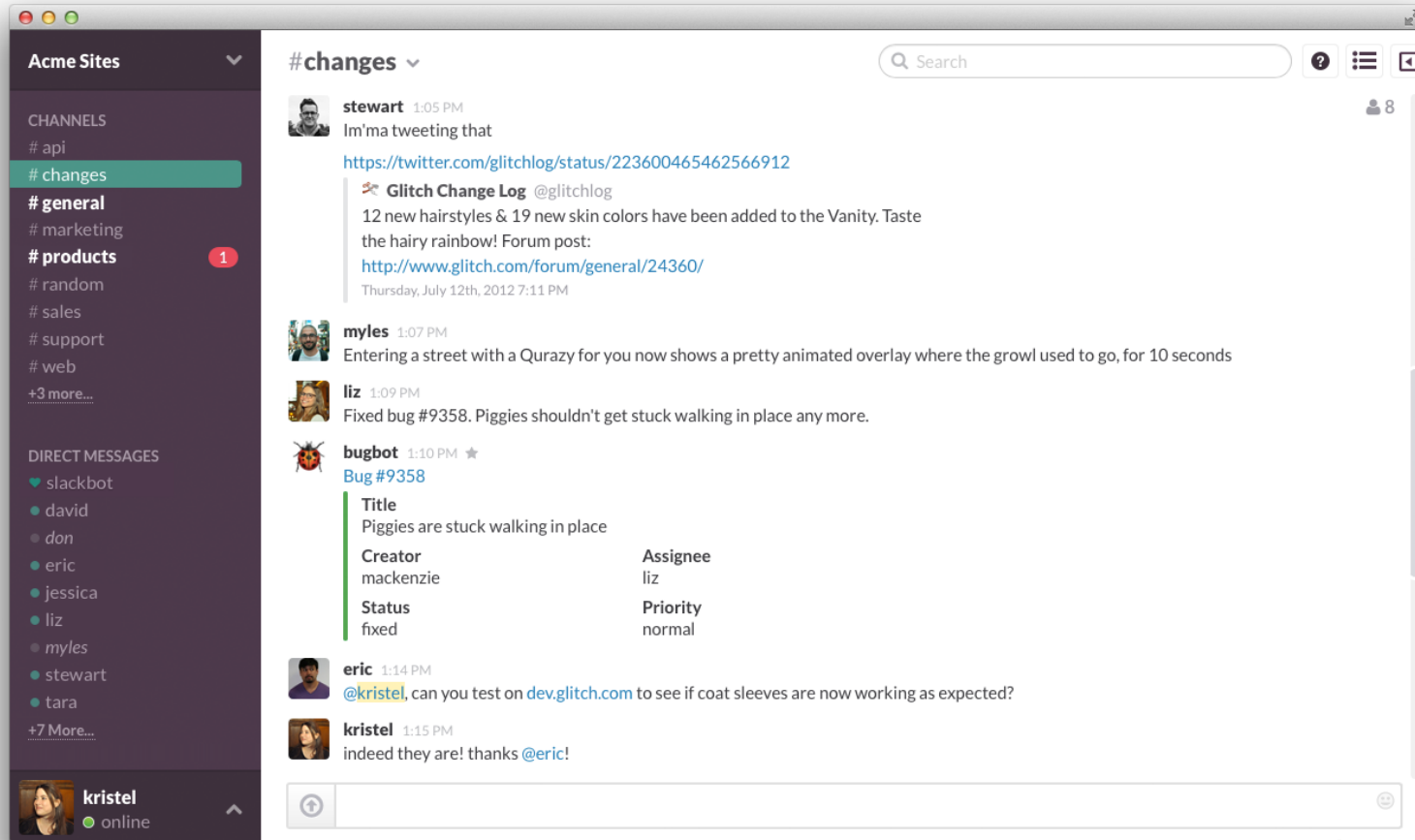


Trello



Jira Software

Slack



RAPID Pro – Deal Tracker

Deal Analysis > Board
Deal Analysis > BU Testing ZZ > Cedant 1 > Test
KH

Inception Date Range: 01/01/2017 - 31/03/2017 My Cards:

Submission	Modeling	Underwriting	Quoted	Bound
M H Insurance Group Demo Prog A 11/17/2016 new PD KH	M Cedant 1 Main Cat #1 01/03/2017 new PD KH	M abcde Blue Jays Re 2 12/31/2016 new PD KH	M Cedant 3 3rd Event Cover 01/03/2017 new PD JW	M B Insurance Test Program 12/14/2016 new PD KH
	M Test Cedant111 Kalisa Re 12/31/2016 new LW PS	M abcde Blue jays re 12/31/2016 new PD KH	M Cedant 2 Main Cat XL #2 01/03/2017 new PD KH	M Cedant 2 Agg Cat XOL 01/03/2017 new PD KH
	Modeling Ready for Review	M abcde bluejays 2 10/28/2016 new JW KH	Ready for Quote Cedant 7 Cascading 02/09/2017 new LW PD	
	Reviewing Cedant 4 Top and Drop 01/31/2017 new DS JM	Ready for Review M Cedant 3 2nd Event Cover 01/03/2017 new PD JW	M Cedant 6 2nd Event ILW 01/03/2017 new DS KH	
	Done TEST D bleu jay 12/31/2016 new PD PS	Under review M Cedant 2 Main Cat XL 03/31/2017 new PD KH	M Cedant E Main Cat 01/10/2017 new PD JM	
		Done	M Cedant testing 11 New Test Pro 12/21/2016 new JW KH	

BOARD UNASSIGNED

GENERAL LAYERS POOLS SUBPROGRAMS MODEL LOSSES NOISE LOSSES PRICING INCURRED LOSSES TOPIC

- BU TESTING ZZ
 - CEDANT 1
 - Back Up Cover 2017-05-01
 - Pool Only Test 2017-04-01
 - Test 2017-04-01
 - Main Cat #1 2017-01-01
 - CEDANT 2
 - Cat XOL 2017-04-01
 - Agg Cat XOL 2017-01-01
 - Main Cat XL #2 2017-01-01
 - Main Cat XL 2017-01-01
 - CEDANT 3
 - CEDANT 4
 - CEDANT 5
 - CEDANT 6
 - CEDANT 7
 - CEDANT TESTING 11
 - GO LEAFS
 - DEMO BU
 - DEMO N
 - F GROUP
 - TEST BUSINESS UNIT
 - Blue Jays Re 2 2017-01-01
 - Blue jays re 2017-01-01
 - bluejays 2 2017-01-01

Kevin Huang hello Wed, 01 Feb 2017 20:08:06 GMT

Kevin Huang Use this one. Wed, 01 Feb 2017 20:09:05 GMT
[deal6_casualty.csv](#)

Action Points +

- Finish pricing run 2017-02-28
- Produce quote to broker 2017-03-10
- Discuss terms and conditions 2017-03-17

Emails

From: khuang
Subject: Fwd: Your Reinsurance News for 16 January 2017

From: khuang
Subject: Fwd: Your Reinsurance News for 16 January 2017

Files and Links +

<http://www.haa-global.com>

Comment...

Conclusions

- Messaging has become a preferred approach for internal communication
- Kanban board based workflow tools have gained much popularity (particularly in the software development industry)
- Ample opportunities exist to modernize the legacy underwriting workflow management systems still being utilized by many insurers and reinsurers