

## Case Study - Unity Life

### Challenge

Unity Life currently has more than 192,000 active policies, \$13.8 billion of insurance in force and \$562 million in assets. Unity sets themselves apart by building strong relationships with their distributors and offering unique and valuable products. They seek to constantly exceed expectations of their distribution partners. Their old Producer Portal was not supporting this strategy:

- Very prone to failure
- Very dated in look-and-feel
- Provided little useful functionality beyond electronic documentation
- Infrequent data refreshes so agents were unable to track progression of business through the back office
- Was only available in English
- Required IT resource for any changes

### Solution

Within a few months, BlueSun provided a new, full function portal for all 7,000 advisors and MGAs who make up Unity's distribution force. The new portal was linked to Unity's administration and underwriting systems to provide up-to-date information refreshed every 2 hours. The portal provided users with:

- French or English content depending on their language preference
- Easy-to-use search features to enable agents to find the information they were looking for quickly
- Configurable reporting
- Commissions payable
- Electronic images of policy document
- An intuitive user interface design that agents found easy to use

In addition, a number of new features helped reduce the administration overhead drastically:

- BlueSun's content management allowed users to adapt the system, keep it fresh and even add new pages instead of engaging their IT department
- The built-in security model meant users only required one sign-on to the system, no matter how many moves they had made within the distribution structure
- When dealing with a support call, the help desk could 'impersonate' a user on the system to facilitate the problem resolution

Security was obviously a concern and BlueSun was subjected to rigorous penetration and security testing using a leading commercial test package. It passed with the highest standard of security that the security agency had experienced.

### Results

The replacement project was successfully delivered within the timescales and budget set for the project. Rob Baboth, Unity Life Vice President, Sales and Marketing, explained: "Unity Life wants to make it easy and worthwhile for our distribution partners to do business with us. Our advanced technology plays a strong role in providing quality customer service. BlueSun enables our distribution partners to mine their clientele and retain complete control over how they manage their business. Our distribution partners will have direct access to underwriting, client services and new business departments. By being responsive to their needs, we can help simplify their business and allow them to focus on the needs of their clients. At Unity Life, we believe our success is based on the success of our partners."

#### Testimonial

"We recently worked with the team from BlueSun in the deployment of a system that was strategically critical for us. Not only did BlueSun deliver the project on time and on budget, but more importantly, developed a system that has given us a significant competitive advantage. Without BlueSun's expertise, it would not have been possible to deliver a system of this quality and depth."

- Brock Campbell AVP Specialty Markets Unity Life