

# Role of partners and technology in IntegriSure's ICT roadmap



## Case study

IntegriSure is a trusted and respected provider of short-term insurance products for responsible individuals over the age of 50 and their businesses, which are topped with a wide range of value-added products. Over the past two decades the company has grown and evolved their offering to become one of South Africa's fastest-growing financial services providers.

Central to this growth has been the company's information and communications technology infrastructure. "Our technological capabilities are the backbone of the operation," explains Marlene Lennox, Manager of the Main Line-of-Business Systems at the IntegriSure Group.

IntegriSure designed and developed a bespoke in-house policy administration system that touches every facet of the business. "Everything, from quotations through to claims management is handled by our policy administration system, which makes it the underlying enabler of our business," explains Lennox.

Built around that system are best-of-breed solutions that allow IntegriSure to deliver an excellent end-to-end customer experience, from sales through to service and claims.

"Our contact centres sit at the heart of our client engagement capabilities and are central to our ability to connect our clients with our products and services," continues Lennox. In 2006, after an extensive assessment of the available options, IntegriSure was confident that PureConnect was the best option to meet the company's immediate and future telephony and, later, omni-channel communication needs.

The modular solution meant that we'd be able to add licenses and features on demand to scale the solution as our business continued to grow," adds Lennox.

<b>Customer</b>	IntegriSure
<b>Industry</b>	Financial Services
<b>Solution</b>	Genesys PureConnect
<b>Challenges</b>	<ul style="list-style-type: none"> <li>• Scalability</li> <li>• Systems lacked vital functionality required in the highly regulated financial services industry</li> <li>• Interoperability</li> </ul>

"More importantly, we required a solution that could record all client interactions."

As IntegriSure provides financial advice via their contact centres, the company is required to have on record all interactions and transactions with clients, whether voice or digital, to ensure records of advice offered are stored and archived for easy access and retrieval.

And PureConnect offered this functionality, which is a key differentiator that influenced our ultimate decision, and one of the many reasons why we still run the system. We also required a stable system with failover capabilities to ensure uptime and business continuity."

The final factor that ensured PureConnect became entrenched in IntegriSure's business model was the solution's interoperability.

"Our contact centres are integral to our business because they form our main business platform and are often the first line of client engagement. We therefore wanted to integrate PureConnect with our bespoke policy administration system to be more efficient and deliver real value."

A successful integration would mean that every interaction that came in to or went out of the contact centre could be identified and linked to a specific client, policy or claim. However, Lennox explains that it is seldom that this type of rich integration occurs between a telephony and communications solution and a main line-of business system.

To realise their lofty ambition, Lennox's team entered into a joint development project that aimed to deliver total integration. "It proved to be a challenge, but everyone was extremely committed to the project and successful implementation was achieved."

From their policy administration system, IntegriSure can now retrieve and listen to a call or review any digital interaction. "Everything is logged in the main system, which is unique in the industry," she continues.

Pivotal Data, a managed ICT services provider and a Genesys Gold partner, subsequently took over the PureConnect support role for IntegriSure in 2015 and assisted with a number of upgrade projects. The latest upgrade had some system integration risks, but Pivotal Data assisted with the beta testing and was on site until the project was complete. Today, IntegriSure runs on-premise PureConnect solutions supporting 4 contact centres, which all have access to omni-channel capabilities across voice, web and email, with automatic call distribution (ACD) functionality and interactive voice response (IVR) for the intelligent routing of inbound calls to contact centre agents.

The successful upgrades also helped to establish a relationship with Pivotal Data that is based on trust, which Lennox believes is essential when you have external technicians working on business critical systems.



**This trust has also given us the confidence to explore new options with Pivotal Data."**

In terms of the company's long-term business strategy, Lennox believes Pivotal Data will add great value. "Our future IT roadmap includes further expansion into cloud services, which may entail migrating our contact centre communication platform into a fully hosted environment.

"It's obviously important to realise the full value of our current investment before we decide to transition, but when that time comes we're confident we have the right partner to enable that migration and ensure its success," concludes Lennox.

## Contact us

**T:** 010 476 0300 **E:** [info@pivotalgroup.co.za](mailto:info@pivotalgroup.co.za) **W:** [pivotaldata.co.za](http://pivotaldata.co.za)

**Integri**  
**Sure**