



Business & Technology Innovation

A Case Study In Success

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Agenda



- Innovation in Wealth Management
- Bravura Solutions – Enabling Business Innovation
- Partners Life – A Case Study in Success
- Conclusions – Lessons & Opportunities
- Recommendations & Next Steps
- Q&A



Innovation in Wealth Management

Innovation
occurs at the
intersection of
technology and
business





Bravura Solutions – Enabling Business Innovation

Enabling Business Innovation



Unified Wealth
Management
Platform



Modern Open
Technology

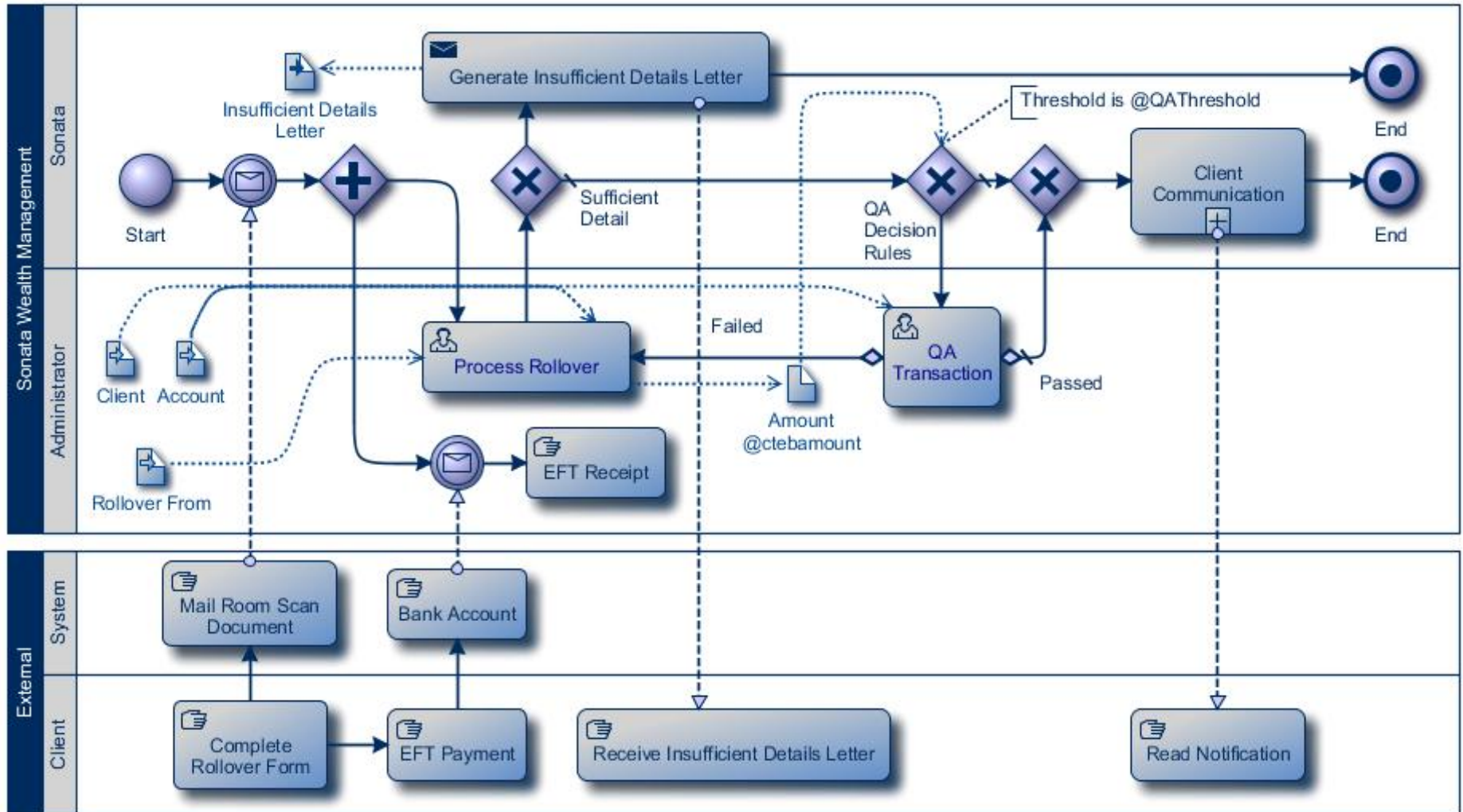


Platform
for
Partnership

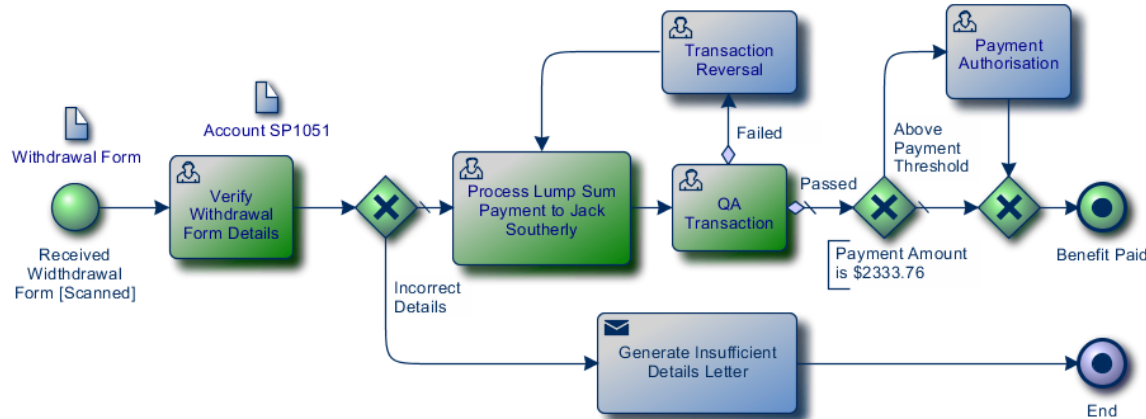


Enabler of
Business Agility

Business Process Modeling for Maximum Agility

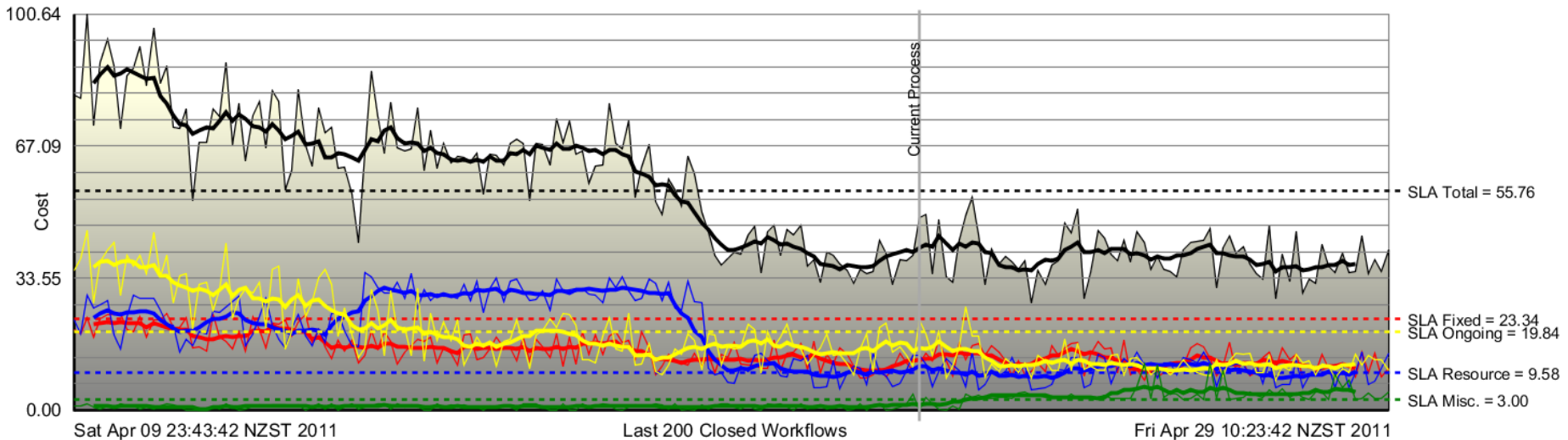


Continuous Business Process Optimisation



Track Actual vs SLA Cost

Average Fixed = 15.02 | Resource = 18.04 | Ongoing = 18.67 | Miscellaneous = 2.15 | Total = 53.88





Partners Life – A Case Study In Success

Some things are better off apart



**Some things
are better
together**



Philosophically Speaking

- **Product/Claims**
- **Competitive Pricing**
- **Cost Efficiency**
- **Partnership**
- **Replication in Other Markets**

Story To Date

- Open for Business in 3 months
- New Business Market Share
- Distribution Force
- Product Ranking
- Staff Numbers
- Cost Ratio compared to Industry
- Licensing

Partners Operating System

sonata

Partners Supporting Systems

- Underwriting Assistant
- Microsoft Share-point
- Microsoft Exchange

Partners Underwriting Processes

- On-line quotes
- Telephone interviews
- 24 hour outsourcing
- Pre-acceptance of exclusions
- Generous non-medical limits
- Underwriting assistant system
- Allowing experienced underwriters to make and communicate decisions

Life's better together





Conclusions – Lessons & Opportunities

Innovation occurs when clever business thinking and clever technology come together...it's not what you are but what you can become that counts!



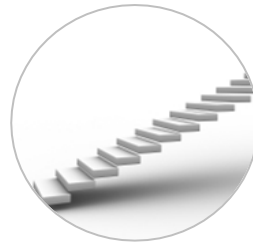
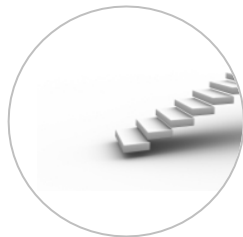


Recommendations & Next Steps

Recommendations & Next Steps



- Accelerating innovation creates strategic opportunities
- The technology works, the benefits are real, the time is now
- To discuss the Partners Life business model chat with Naomi
- To discuss Bravura's business solutions chat with Roland
- To see a Sonata demonstration visit Bravura's booth





Questions?





Thank you

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BravuraFinTech



Bravura Solutions

THE BLOG

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Thank you

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