

Edwards Insurance Brokers Case Study

Richard Hayward, Insurance Manager at Edwards Insurance Brokers, talks about their experience with Open GI and how Core's streamlined workflows are realising time and cost for the business.

Established in 2004, Edwards Insurance Brokers is a family-run, specialist broker providing church, charity, commercial and high value homeowners' insurance. We have been an Open GI customer since 2012, and OGI has supported us to grow into a leading church and charity brokerage. Operating Open GI's platform on a virtual environment, alongside the Core Toolkit software, and assistance from the Open GI Training team and Broker Network, we are able to administer niche schemes effectively from the Open GI Core Back-Office.

“OGI and Core's features have helped our business create a greater impact.”

OGI's Core platform has been instrumental to our success to date, but we were aware that we were only scratching the surface of the many capabilities and features that the platform can provide. We had also previously acquired a scheme book of business with a high policy count but relatively low average premiums.

Our Schemes team was therefore finding it more and more difficult to quickly turn around the numbers of quotes it was required to provide to its new book of business, as well as manage the volume of renewals and mid-term adjustments for our existing customers.

From the outset, we recognised that we could save administrative costs, and realise time and resource efficiencies, if we could speed up our quotation, renewal, and document production processes.

We therefore approached OGI for help, requesting product advice, training, and support from their Consultant and Training teams. We also wanted to find ways to save time and costs in dealing with our new book of business and learn more about the deeper functionalities of Core so we could meet and go beyond our goals.

“We had only mainly used the basic functionalities of the Open GI system, not realising what an impact it could have for us if we utilised more of its capabilities.”



“Training and assistance are always at hand should we need it.”

“It has transformed the previously more time-consuming process that we had, relieved pressure from the team and we are able to tweak or adjust it how we need to. The training we received was [also] excellent and assistance is always at hand should we need it.”

After engaging with OGI's Consultancy teams, they recommended implementing either Core Toolkit or Scheme Toolkit for our Core system. We decided to adopt the Core Toolkit and thanks to the hands-on training delivered by OGI's Training team, we have been able to create and implement our own bespoke frames with fields for whatever our business may need. This includes statement of fact/risk information and the ability to embed premium calculations based on the information entered.

These new functions are now also enabling our team to quote/bind cover and produce fully compliant renewals in just a couple of minutes, with fully automated letters, demands and needs statements to match.

“We will be working with OGI once again to streamline another insurance cover.”

This time we will be utilising Instream and OGI's Consultancy team to manage the data migration from our insurers into our own custom-made frames, designed specifically by us for that product.

We will also be able to produce Risk Registers, which will be populated by these newly implemented frames to provide to our clients.

“We have been very happy with the advice, training and consultancy work we have received and would happily recommend these products.”

