Pukka Services

CLIENT TESTIMONIAL

"Have used Insurance Data Solutions for some rather complex systems data migration work and have to say very impressed"

Andy Woodbridge, Associate Director Insurer Operations at Pukka

Pukka Services T/A Action 365 Ltd as an MGA with expert underwriters, offers bespoke services for both commercial vehicles and private cars through brokers, and with Action 365's claims arm, they provide a first class claims service.

The business has grown significantly by collaborating with technology partners to improve the customer journey and move away from the one size fits all approach. Next Generation telematics allows them to look more closely at driver history to reduce risks and improve loss ratios by cutting claims costs.

Recently they have been working in partnership with a major software house to develop a new MGA back-office system, improving processes in addition to adding new product lines and schemes and increasing distribution channels. And to complete the successful data conversion to this new platform they teamed up with Insurance Data Solutions.

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INSURANCE DATA SOLUTIONS

CASE STUDY

INSURANCE EDI DATA MIGRATION & SOLUTION

Demo Version
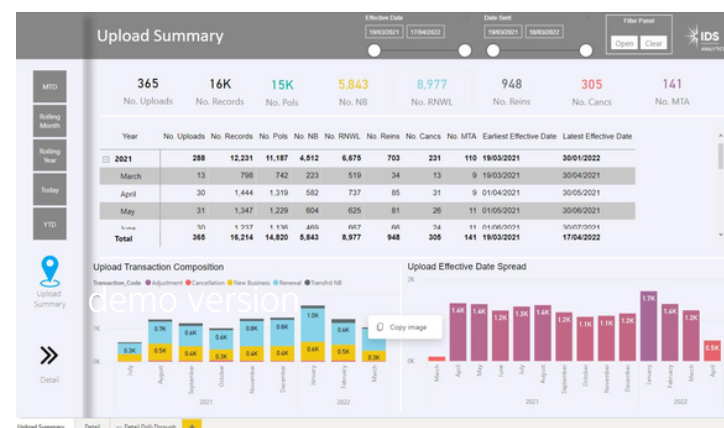
THE CHALLENGE - Migrating EDI Policies from a Legacy System to a new MGA back office system

As established data migration specialists in the Insurance Industry, Insurance Data Solutions (IDS) were engaged by Action 365 to efficiently migrate some of their book of Private Car business from their legacy system onto their new MGA back office system. Some of the policies within the legacy system book were non EDI policies, which meant that a solution was needed to convert policy data into EDI format. If a traditional big-bang migration had been implemented, the EDI count would have been lost on all policies, which would have meant that they could no longer have been transacted by EDI.

Action 365 needed an efficient solution, which would allow them to perform a bulk upload of all policies, convert them into EDI messages, then load the EDI messages into the new system, thus maintaining the integrity of each policy and allowing them to forward process.

Whilst keeping the process simple, the conversion itself consisted of a complex engine to map client / policy and policy risk information from a template consisting of nearly 250 items of data to the standard EDI format. In addition to the mapping, a validation layer was created, to check for valid data within the columns supplied. The validation layer is executed at the point of uploading the file and if invalid data is found then the user will be alerted and is then able easily to rectify any issues found.

THE BENEFIT - PUKKA Services EDI Insurance Data Migration Solution

The project was delivered successfully during Q4 of 2021. It consists of a secure Web Portal, which allows legacy spreadsheets to be uploaded. The policies within each spreadsheet are then instantly transformed into EDI messages, which can then be loaded into the back office system. The portal stores the EDI count for each policy, which means that after the bulk upload is done, further ad-hoc uploads can be made for any mid-term adjustments or cancellations. Within the Web Portal, Power BI dashboards also track key KPI's on number of Uploads, Records, Policies, New Business, RNWL, Reins, Cancelations, MTAs by effective date etc. Offering up to date MI and insight and enabling drill through to the detail for further filtering and analysis.

Action 365 intend to use their EDI Solution in the future to help their broker partners who don't have access to EDI systems, giving them the ability to upload spreadsheets into the portal, which in turn will efficiently transform the data and load directly and effortlessly into the Action 365 back-office system.

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