SIMPLIFYING B2B POLICY MANAGEMENT FOR MARKIT SYSTEMS' MGA PLATFORM

PROBLEM STATEMENT

Markit Systems sought to streamline commercial policy administration for its MGA platform. The challenges:

Misalignment among stakeholders from inconsistent workflows.
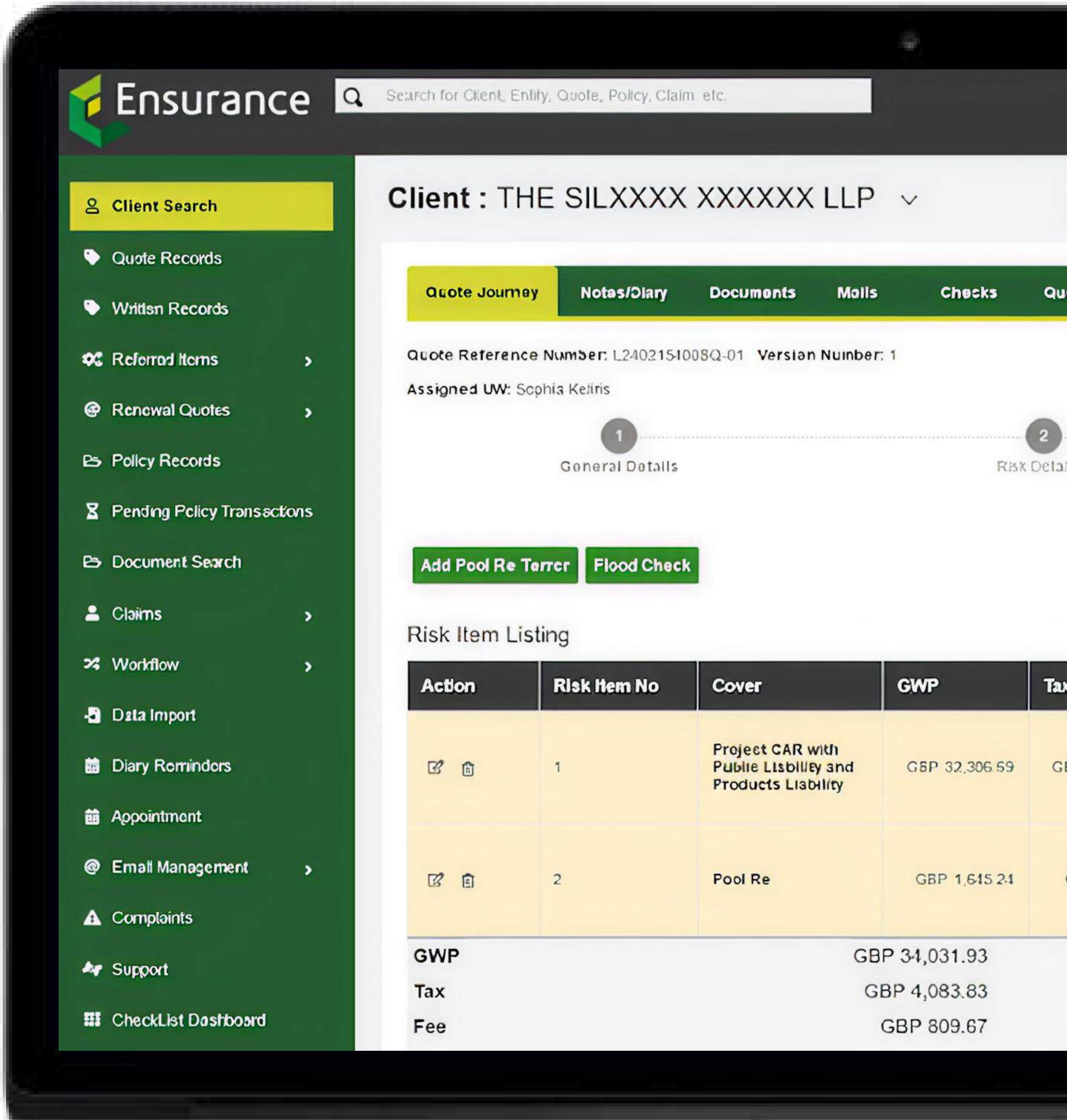
Frequent errors from manual data entry.

Inefficiencies due to fragmented documents.

Manual risk assessments lack precision.

INT.'S SOLUTION

INT. created a **B2B Policy Management Module** unifies stakeholders, digitizes servicing, and embeds compliance.

- ✓ **Live Policy Dashboard:** Real-time policy status with mapping to quote ID, stakeholder roles, and alternate policies

- ✓ **Full Lifecycle Tabs:** Payments, Documents, Claims, Cancellation, Notes — all in one interface.

- ✓ **Structured Risk Views:** Segmented input forms for policy risk data, premiums, clauses, and payments

- ✓ **Role-Based Access:** Brokers, cover holders, and underwriters see only what's relevant — with diary alerts and approval triggers

- ✓ **Compliance & Governance Tools:** Built-in sanction checks, document logs, and audit history at every policy stage

6-Step Applied Process

01

Operational Workflow Mapping:
Defined each lifecycle step for NB issuance, endorsements, MTAs, and policy termination.

02

Unified Policy Workspace Design:
Created an all-in-one dashboard with tabs and widgets for seamless access.

03

Role-Specific Interfaces:
Deployed secure, filtered views based on stakeholder type and policy stage.

04

Lifecycle Automation:
Connected diary events, audit trails, and approval triggers to reduce manual follow-ups.

05

Integration-Ready Architecture:
Built with flexibility to connect CRM, core systems, and claims modules.

06

Compliance Enforcement Layer:
Enabled end-to-end document trails, sanctions logs, and role-based journal entries.

IMPACT

83%

faster access to live policy details across broker, underwriter, and operations teams

79%

audit-ready policy records with automated document trails and sanction logs

72%

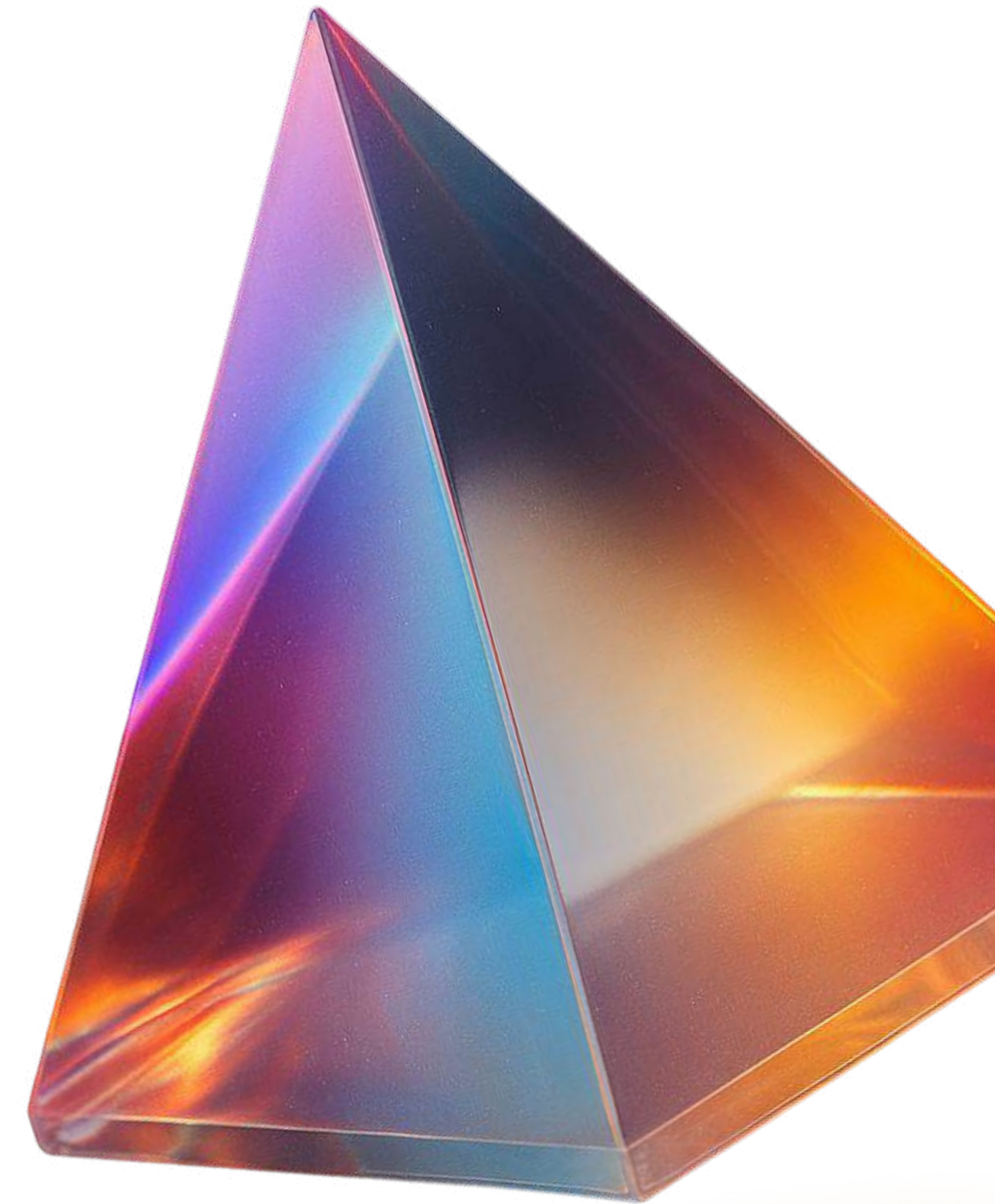**reduction in servicing errors** from manual policy data handling

2x

faster onboarding of new broker partners via standardized role-based views

48%

increase in operational efficiency for mid-term endorsements and cancellations

Significant drop in compliance risk, with all lifecycle stages fully tracked and documented

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