

Web Design, Portal & Web Application Development,
Sales Enablement, & Sitecore Web CMS Implementation
Max New York Life



Blending Creativity and Technology to Deliver Better Business Solutions

New York . Toronto . Phoenix . Los Angeles . Dubai . New Delhi

Challenges

- The reason to design a new website for their company was the entire new look and feel along with efficient functionality. The company wanted to ramp up its sales process online and support its marketing effort strongly with rapid messaging, promotions & other new initiatives. The entire online presence was to be transformed into a dynamic interface with cutting-edge product information & highly interactive user experience.
- The current website had excessive content which was not being managed properly
- Replicate the company's branding on the online channels from offline mode
- Reduce the cost of support to Customers through their Contact Center
- They also wanted eDynamic to build user-friendly portals for them.

Solutions

- A completely redesigned website designed to meet diverse needs of the audience
- A detailed Information Architecture for the new website was created in such a manner that heavy content could be handled with great ease
- eDynamic used Sitecore, a state-of-the-art content management system, to build the site, which had an impressive look and feel and provided quick and easy navigation. The site is now content driven and has fresh content being pushed into it frequently.
- To make the customers realize the importance of insurance policies in life, eDynamic has designed various calculators such as Retirement Calculator, Financial Calculators, Education Calculators, and Health Calculators for the website of the client.

Benefits

- eDynamic provided Max New York Life with the flexibility they always needed, to drive their marketing & sales push online. This included design & development of a user friendly Agent Portal that would have a high adoption rate.
- The Group Portal drives CRM & up/cross sell to corporate end customers of Max.
- Some of the other interactive & process driven application development in this project including Premium calculators, Agent training presentations, IAM Flow, My Money, etc. have made the website more user-friendly and interactive.
- eDynamic's architected solution eliminated the communication gap between the company and its employees.
- To make the customers understand the product better and to make a decision on choices available, eDynamic designed a premium calculator for Max New York Life.
- eDynamic provided its strength of expertise in designing & developing the customer portal for the benefit of the customers, which has the ability to access information instantly on all the products available.
- Group portal was also developed to cater to the needs of the corporate clients. With the help of group portal, the client companies can access information on each and every product available/Bought, track the records of the employees insured etc.

Website design before eDynamic engaged with Max New York life



This is the new website designed by eDynamic for Max New York Life



Objectives of the Website

- Customer Acquisition
 - Agent Acquisition
 - Employee Acquisition
-
- The Website is made in accordance with Max New York Life's objectives.
 - The Website provides users with online policy premium payment functionality.

Technology Used

- .NET - Framework 2.0
- SQL Server 2005

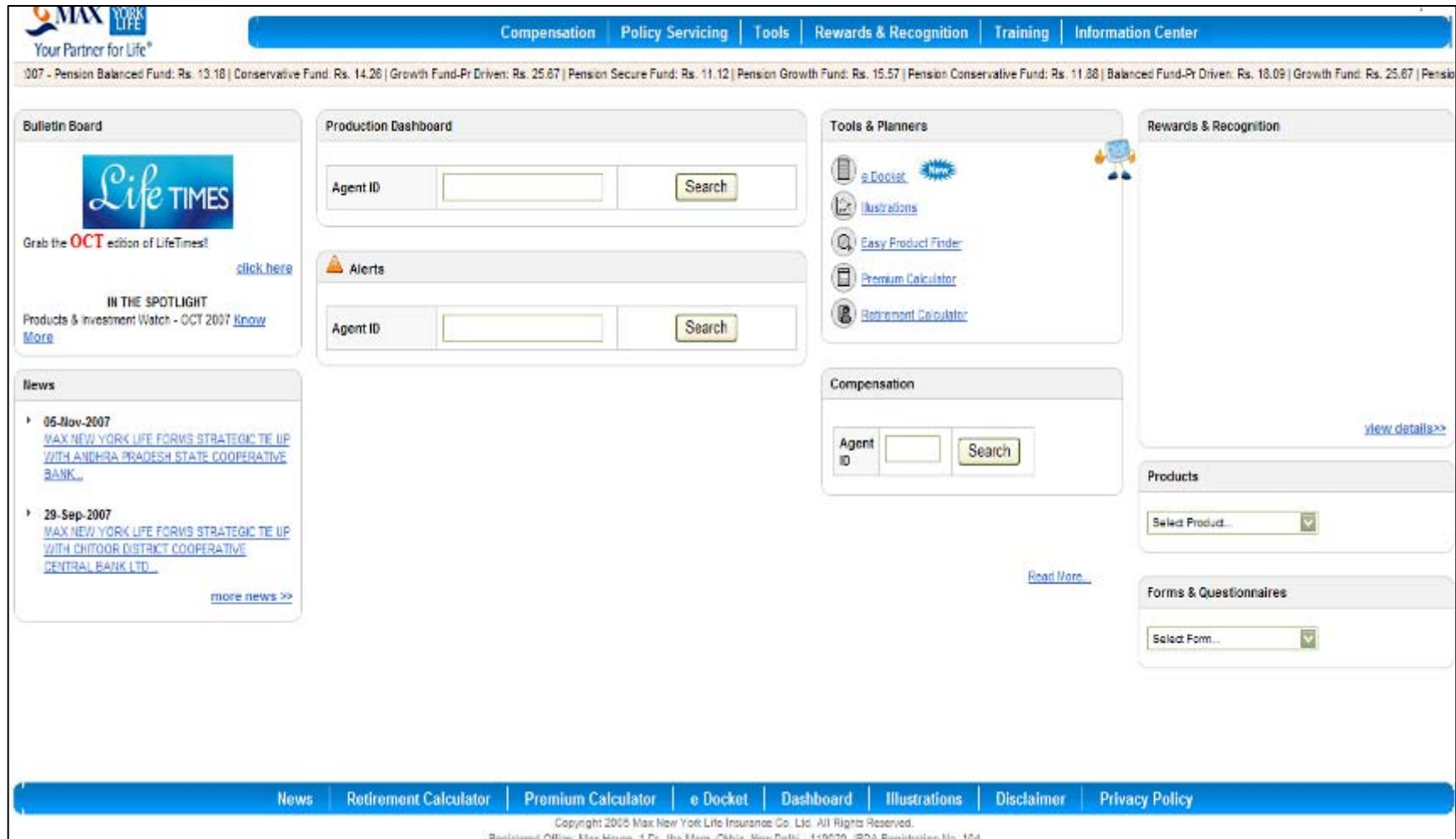
Challenges

- Provide Increased Competitive Advantage leading to Higher Retention of Agents.
- Provide Consistent messaging to the Agent Community.
- Reduce loss of business due to unavailability of information and marketing collateral - e.g. Ability to pull up illustrations for customers, or provide product brochures.
- Reduce the costs and time taken to communicate with the Agent Community.
- Provide Quick and easy access to Tools & Calculators enabling them to win business quicker, service customers better and increase their effectiveness.
- Reduce the cost of support to Agents through their Contact Center.
- Provide Agents with Increased Control & Visibility into their business.

eDynamic's Solutions

The following image of the Agent Portal Landing Page demonstrates various features of the portal intended to meet the objectives of ease of use, easy engagement and personalization. Functionality on this page includes:

- Bulletin Board
- Dashboard
- Status Tracking for Proposal & Policy
- Promotions
- Agent's Alerts
- Compensation for Agent
- Drop-down for accessing Online Forms
- Tools & Planners
 - Illustrations
 - Insurance Calculator
 - Retirement Calculator
 - Premium Calculator
 - Easy Product Finder
- Products - NAV



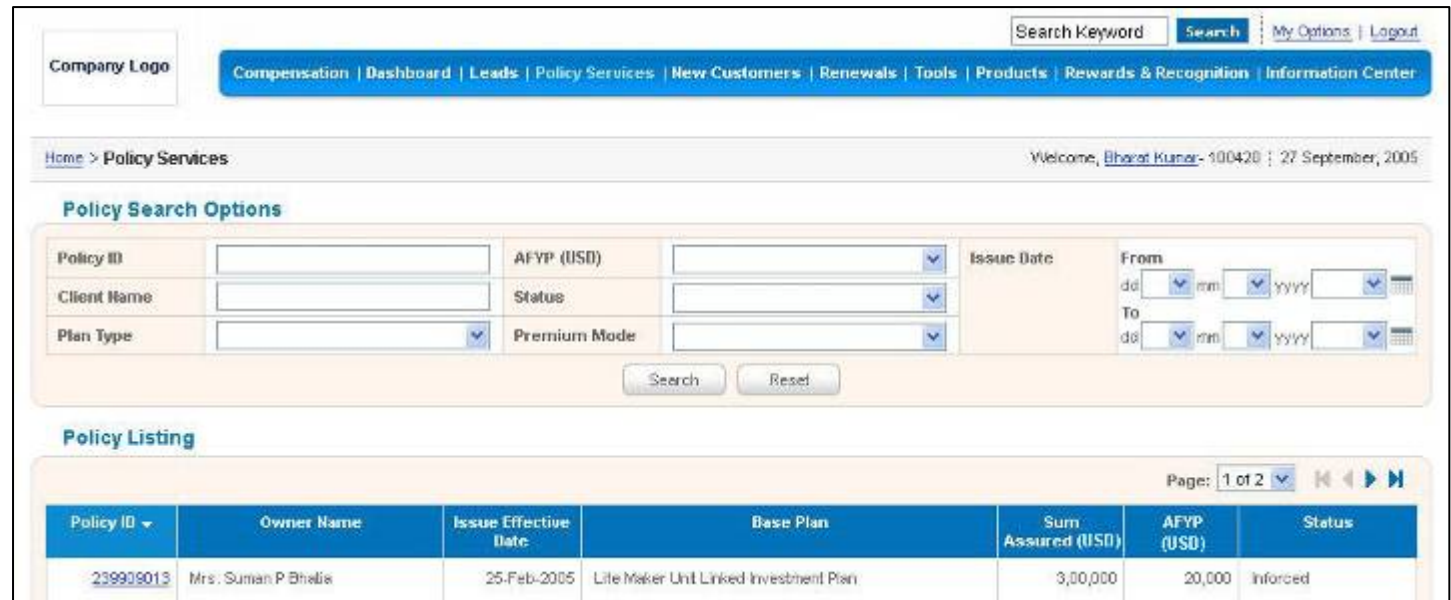
The screenshot displays the MNYL - Distribution Portal dashboard. At the top, there is a navigation bar with links for Compensation, Policy Servicing, Tools, Rewards & Recognition, Training, and Information Center. Below this is a status bar showing various fund performance metrics. The main content area is divided into several sections:

- Bulletin Board:** Features a "Life TIMES" logo and a link to grab the OCT edition. Below it, "IN THE SPOTLIGHT" highlights "Products & Investment Watch - OCT 2007" with a "More" link.
- News:** Lists two news items from 05-Nov-2007 and 29-Sep-2007, both mentioning strategic tie-ups with cooperative banks. A "more news >>" link is provided.
- Production Dashboard:** Includes a search box for Agent ID.
- Alerts:** Includes another search box for Agent ID.
- Tools & Planners:** Lists several tools: e Docket (marked as new), Illustrations, Easy Product Finder, Premium Calculator, and Retirement Calculator.
- Compensation:** Includes a search box for Agent ID.
- Rewards & Recognition:** Contains a "view details >>" link.
- Products:** Features a "Select Product..." dropdown menu.
- Forms & Questionnaires:** Features a "Select Form..." dropdown menu.

At the bottom, there is a blue navigation bar with links for News, Retirement Calculator, Premium Calculator, e Docket, Dashboard, Illustrations, Disclaimer, and Privacy Policy. Below this bar, a copyright notice reads: "Copyright 2005 Max New York Life Insurance Co. Ltd. All Rights Reserved. Registered Office: Max House, 1/F, Jha Marg, Okhla, New Delhi - 110020. IRDA Registration No. 104".

The Policy Services section, shown below, empowers the agent to conduct a targeted search for the policies logged by him/her on the basis of:

- Policy ID
- Client Name
- Policy Type
- Status
- Premium Mode
- Issue Date (From – To)



The screenshot displays the 'Policy Services' section of the MNYL Distribution Portal. At the top, there is a navigation bar with links for 'Compensation', 'Dashboard', 'Leads', 'Policy Services', 'New Customers', 'Renewals', 'Tools', 'Products', 'Rewards & Recognition', and 'Information Center'. A search bar is located in the top right corner, and a 'My Options | Logout' link is also present.

Below the navigation bar, the page title is 'Home > Policy Services' and the user is greeted with 'Welcome, Bharat Kumar - 100420 | 27 September, 2005'.

The main section is titled 'Policy Search Options' and contains several search criteria:

- Policy ID:** Text input field.
- Client Name:** Text input field.
- Plan Type:** Dropdown menu.
- AFYP (USD):** Dropdown menu.
- Status:** Dropdown menu.
- Premium Mode:** Dropdown menu.
- Issue Date:** Date range selection with 'From' and 'To' fields, each containing day, month, and year dropdowns.

Buttons for 'Search' and 'Reset' are located below the search options.

Below the search options is the 'Policy Listing' section, which includes a table of results. The table has the following columns: Policy ID, Owner Name, Issue Effective Date, Base Plan, Sum Assured (USD), AFYP (USD), and Status. The page number is indicated as 'Page: 1 of 2'.

Policy ID	Owner Name	Issue Effective Date	Base Plan	Sum Assured (USD)	AFYP (USD)	Status
239909013	Mrs. Suman P Bhalia	25-Feb-2005	Life Maker Unit Linked Investment Plan	3,00,000	20,000	Inforced

The New Customers section, wherein the Proposal Details are provided, is displayed below. The Cycle of a proposal getting converted into policy has been clearly articulated and includes:

- Proposal Data Entry
- Proposal Quality Check at the Head Office
- Medical Desk
- Underwriting Decision
- Final Verification
- Premium Check
- Illustration
- Policy Issued


[My Options](#) | [Logout](#)

Company Logo

[Compensation](#) | [Dashboard](#) | [Leads](#) | [Policy Services](#) | [New Customers](#) | [Renewals](#) | [Tools](#) | [Products](#) | [Rewards & Recognition](#) | [Information Center](#)

Proposal Details

Home > [New Customers](#) > **Proposal Details**
Welcome, [Bharat Kumar](#) - 100420 | 27 September, 2005



Owner's Name	Shakuntala Jobanputra	Sum Assured	USD 3,00,000	Plan	Life Maker Unit Linked Investment Plan
Proposal ID	412620569	Received Date	24-Sep-2005	Status	Med Desk
AFYP	USD 20,000				

Personal Details

Insured Name	Sukh Jobanputra	Mobile	9115643421	Date of Birth	03-Jan-1978
Relationship	Mother	Email	sukhjit@hotmail.com	Marital Status	Married
Phone	0141-2392100	Age	27 years		
Address	147 Padmevati Colony, Jaipur, Rajasthan - 302019	Gender	Male		

Proposal Information


Modal Premium	USD 14,999	Premium Mode	Annual	Term	3 years
Billing Type	Direct Bill	Uncleared Money	USD 20,000		

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The Renewals section, displayed below, displays the Due Date Calendar and, with the help of this tool, the Agent is able to track the policies for which the premium is about to get due. Through this screen, the agent can view the policies due for the next 3 months. The policies which are due can be listed on clicking & the Agent gets to view the following information:

- Premium Due Date
- Policy Number
- Policy Holder Name
- Contact Number
- Preferred Address
- Modal Premium
- Payment Mode



[My System](#) | [Logout](#)

[Compensation](#) | [Dashboard](#) | [Leads](#) | [Policy Services](#) | [New Customers](#) | [Remittals](#) | [Tools](#) | [Products](#) | [Rewards & Recognition](#) | [Information Center](#)

Due Date Calendar

Home > Remittals > Due Date Calendar
Welcome, Bharat Kumar - 100420 | 27 September, 2005

Due Date Calendar

October 2005

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4	5 <small>Policy due 5</small>	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26 <small>Policy due 3</small>	27 <small>Policy due 2</small>	28	29
30	31 <small>Policy due 2</small>					

November 2005

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

December 2005

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Policy Listing

Listing for 1-Oct-2005 to 31-Oct-2005 Page: 1 of 2

Process/ Due Date	Policy Number	Policy Holder Name	Contact Number	Preferred Address	Modal Premium (USD)	APVP (USD)	Mode
01-Sep-2005	229205013	Mrs. Sunan P Sharda	Mobile: 985401300 Home: 49565544	1 B, Kothi Apartments, 45, Nagerbakkam, Chennai, Tamil Nadu - 600005	8649	32637.00	CHQ
05-Oct-2005	229205014	Mr. Rakesh Sharma	Mobile: 9849804000 Home: 46462554	20 C, Kamalaya Apartments, 246 Nagerjuna New Delhi - 110025	4596	63737.00	CHQ
01-Sep-2005	229205013	Mrs. Sunan P Sharda	Mobile: 985401300 Home: 49565544	1 B, Kothi Apartments, 45, Nagerbakkam, Chennai, Tamil Nadu - 600005	8649	32637.00	CHQ
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Records 1-18 of 19 Page: 1 of 2

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Benefits


- Reduced Agent Attrition
- High Rate of Portal Adoption
- Increase in policy closure rates
- Positive Feedback from the agents on the Portal - they felt there was a marked increase in productivity
- Increased control and visibility to agents on their business through real time access of information and reports
- The Portal built a strong and effective internal and external communication channel
- Reduction in support calls for Agents which led to reduction in support costs
- Reduction in costs of printing marketing and product collateral

- eDynamic has developed and designed a Group Portal for Max New York Life. This portal caters to the needs of CORPORATE CLIENTS of the Insurer. Corporate customers can access information on each & every product available/bought, track the records of their respective employees insured ,etc.
- Group Portal is a private, secure website which enables the Insurer to share documents and Policy information with their Group Policy end customers.
- The portal enhances customer relationships by providing complete 24X7 access to their policy/premium statements along with product brochures, process documents, etc. online.


Technology Used

- JAVA
- Web Sphere
- Oracle


Group Portal Designed by eDynamic for Max New York Life



Company Logo



Group Customer Portal



MAX NEW YORK LIFE
Your Partner for Life

NAVs : (As on 16-Jul-2008)
[Nav History](#)
[Linked Group Gratuity - Growth Fund - 1](#)

Welcome Amit T
[Contact Us](#) | [Change Password](#) | [Support](#) | [Logout](#)

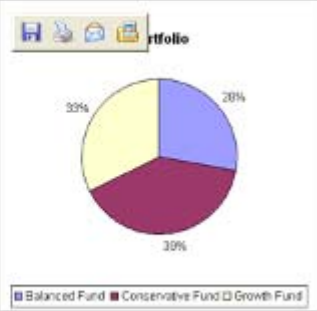
[Account Statement](#)
[Redirect Funds](#)
[Switch Funds](#)

Current Portfolio

Welcome to Online Switch section! Your Current Portfolio of funds is displayed below. For switching your funds, click on the link "Proceed for Switching"

Policy Number :	00005890	Policy Holder :	ABC Ltd.
Member ID :	2445	Member Name :	Amit T.
Transaction Description :	Regular Contribution		

S. No.	Fund Name	Units	NAV	Amount
1	Balanced Fund	25	351231	456566
2	Conservative Fund	35	432423	56363
3	Growth Fund	29	423456	345453



Legend: ■ Balanced Fund ■ Conservative Fund ■ Growth Fund



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