



TechCanary Introduces

# CanaryServices

## Competitive Advantage and Technology in the Insurance Industry

For the insurance industry, the promise of technology is to increase efficiency, profitability and competitive advantage through digital transformation. Yet, the insurance industry has to share data across companies and even competitors, and as a result, everyone's data needs to conform to certain standards to be interoperable. That means competitive advantage must come from an insurance company's people, products, processes and procedures.

To accomplish that competitive advantage, insurance technology must adapt to the unique people, processes and procedures of each company, not vice versa. Unlike traditional insurance software, open, configurable, cloud-based platforms like Salesforce and TechCanary are designed to fulfill that promise of technology.

So, no matter how comprehensive and well-designed the software, each company should adapt it to their needs. That's where CanaryServices comes in.

## Why CanaryServices

CanaryServices was formed out of a desire to provide professional services assistance to help insurance companies leverage technology for competitive advantage.

CanaryServices specializes in TechCanary and Salesforce implementations for the insurance industry. CanaryServices is led by a team of senior IT Executives with decades of experience in the insurance and financial services industries in roles from consultant to CIO. Expertise ranges from system implementation, integration, and legacy insurance systems.



CanaryServices offers TechCanary and Salesforce specific packages for everything from setup, data migration, deployment, configuration, and ongoing support.

CanaryServices customers include insurance companies large and small, from boutique agencies and brokerages, to MGAs, MGUs wholesalers and carriers.

## Two Categories of CanaryServices

CanaryServices offers two categories of services to companies that are upgrading to the TechCanary and Salesforce solution:



**Implementation and Configuration Services** – to plan and manage the implementation and configuration of TechCanary and Salesforce to a company's unique processes and procedures.



**Data Migration Services** – to successfully map and move data from legacy insurance software to TechCanary and Salesforce.

Within each category, CanaryServices offers different packages to choose from depending on how much a company does or does not need a turnkey solution verses having the resources to do much of it themselves.

Most companies need a combination of configuration and migration support during the implementation process.

## Implementation and Configuration Packages

CanaryServices' implementation and configuration packages ensure a successful TechCanary and Salesforce implementation that is specific to your company's way of doing business.

Each package includes project management, best practice solutions and process workshops to tailor the following TechCanary business processes to your specific needs:

- New Business
- Binding
- Policy Checking
- Certificate
- Audit
- Endorsement
- Claim
- Cancellation / Reinstatement
- Renewal

### Tier 1 – Implementation & Configuration

A package to get you up and running on TechCanary and Salesforce quickly or when you have internal resources to help.

- Business process design and implementation
  - 2 tailored workflows and 5 email templates
  - 2 new data objects and 30 fields
- 5 custom reports and 1 dashboard

### Tier 2 – Implementation & Configuration

A more hands-on approach for multiple departments.

- Business process analysis, design and implementation
  - 5 tailored workflows and 10 email templates
  - 4 new data objects and 90 fields
  - Advanced configuration with Apex triggers
- 10 custom reports and 3 dashboards

### Tier 3 – Implementation & Configuration

A more turnkey solution with deep requirements analysis to determine, design and implement your competitive advantage.

- Business process analysis, design and implementation
  - Tailored workflows and email templates
  - New data objects and fields
  - Advanced configuration with Apex triggers, Apex classes and lightning components

## Data Migration Packages

CanaryServices' migration packages ensure data in existing legacy systems is mapped and moved to TechCanary with integrity.

### Tier 1 – Migration Package

A package to move you over to TechCanary and Salesforce quickly or when you have internal resources to help.

- High-level data mapped and moved using off-the shelf header templates

### Tier 2 – Migration Package

A more hands-on approach for multiple departments.

- High-level data mapped and moved using off-the shelf header templates

### Tier 3 – Full Migration

A turnkey solution to map and migrate your data.

- Scoping workshops
- Guided header and detail load



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