

# Welcome to Novidea

The data-driven edge for insurance distribution

Novidea's end-to-end platform provides real-time business intelligence and seamless workflow management for brokers, agents, MGAs, bancassurance and corporate risk management.

## Do you have the answers you need to thrive?

Where are your biggest cross-sell and upsell opportunities? Which clients are your most profitable, and which may be costing you money? What's in your pipeline, and will you meet your targets?

For many insurance agents and brokers, answering questions like these is often a matter of guesswork. With fragmented business systems focused on operations and data scattered across outdated software, getting a clear picture of opportunities and business health is next to impossible.

As commissions and margins are squeezed, regulation and competition intensify, and customers demand more responsive service, you can't afford guesswork — you need data.

## Success through insight

Designed specifically for insurance distribution, the Novidea cloud-based platform gives you a single view for managing the entire insurance distribution lifecycle across all lines of business.

### Novidea customers see measurable results



+24%  
claims  
capacity

+30%  
renewals

+60%  
back office  
efficiency

+40%  
cross-sell

+63%  
policy sales

+75%  
faster agent  
onboarding

### Seize every opportunity

Novidea gives you the customer insights you need to optimize every interaction, capturing not only more revenue, but also boosting customer retention and renewal rates.

By consolidating all your front- and back-office data and workflows — from leads to quotes to policy administration — Novidea's integrated solution delivers full visibility into the entire customer journey and actionable insights to help you increase sales, profitability and productivity. It promotes service excellence, simplifies regulatory compliance, and gives you secure data access from any device, anytime.

## Streamline and simplify

Novidea not only helps improve customer services and business performance, it also slashes costs and inefficiency:

- **Cloud-hosted.** No servers to manage, software to update or backups to worry about — and users can log in securely from any device at any time.
- **Scalable.** Quickly and easily add new channels, lines of business, territories and revenue streams in any region or regulatory environment.
- **Modular.** Novidea is a complete, end-to-end solution, but you can deploy at your own pace, starting with key modules and building from there.
- **Proven.** Novidea is built on the proven Force.com multi-tenant development framework, for scalability, security and reliability you can count on.
- **Easy to deploy.** Migration and integration is painless for your business.
- **Customizable.** Flexible workflows are easily customized to suit your business practices.

## Self-service portal

Novidea offers an optional selfservice, branded portal solution. It enables you to provide clients with secure access to their insurance portfolios, creating new business opportunities while reducing agent workload and costs.



*Novidea was founded in 2009, bringing together insurance and technology professionals to apply data-driven and SaaS technologies and best practices to the specific needs of insurance distribution professionals and their customers. The company today serves global brokerages, agencies, Bancassurance and corporate insurance operations servicing more than 10M policies worldwide. The company has offices in the UK and US, with R&D based in Israel.*

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