Brochure /

Keylane Plexus

End-to-end standard SaaS Life & Pension platform for operational excellence

#UnlockTomorrow

www.keylane.com

Keylane

It's time to focus: on you

As a life and pension provider you have to deal with changing customer expectations, regulatory upheaval and demographics, and at the same time, keep your focus on developing your business and creating profitability.

The best way to cope with these challenges is to embrace the change and respond to the dynamic needs of your customers by offering high quality products and services.

With Plexus, our end-to-end standard platform for life and pension, we help you to improve your digital foundation, accelerate your time-to- market and adapt to market requirements quickly. With guaranteed service quality for predictable costs.

What's going on in the life and pension industry today?

Regulatory compliance

The number of regulations and industry requirements are ever increasing.

Agility and short time-to-market

Quick and easy product launch based on real-time information is key.

Technology innovation

The market is moving away from tailor-made software on premise to standard SaaS solutions.

Market consolidation and differentiation

Being part of a standard platform ensures economies of scale and enables differentiation through products and unique customer experience.

Individualisation of society

This requires flexibility in your administration systems to meet future customer demands and make pension relevant.

The answer is Plexus

Plexus supports you in meeting the industry trends and ever-changing market needs.

Our standard SaaS platform takes care of your critical business processes end-to-end while you focus on developing your business and providing your customers with excellent service.

Topdanmark
Forsikring • Pension

A complete and unified system covering all our business processes and products

"Our co-operation with Keylane anchors our digital transformation process towards higher efficiency and competitiveness. With our digital foundation in place we achieve lower administrative costs and ensure compliance – but most importantly, we can focus our resources on creating additional value for our customers by strengthening the customer experience and accelerating our time-to-market when launching new products and services."

Vivian Weis Byrtholt, CEO at Topdanmark Liv

Plexus: designed for strengthening your business

Omni Channel

Plexus's service-oriented architecture allows you to serve different user groups via different channels and devices. Using the Plexus user interface or by connecting your own portals/apps and future digital business models directly on top of Plexus's service API's.

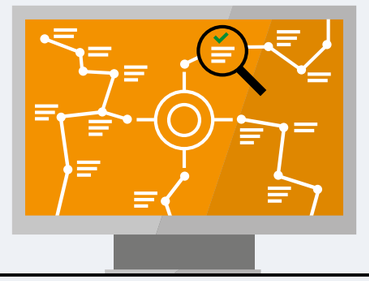
Plexus's strength lies in its ability to smoothly integrate with existing systems, interfaces and other internal/external integrations.

Customer Centric

With Plexus you can offer advisors and customers a 100% digital platform to manage applications, policies and claims quickly, easily and secure.

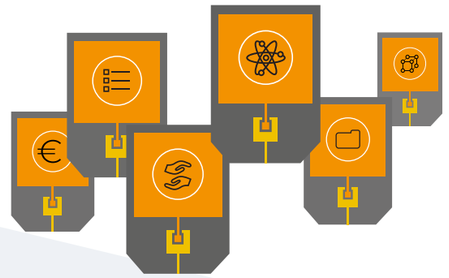
Risk & Compliance

Meeting constantly changing rules and regulations and industry standards can be difficult and expensive. As a leading software vendor in the pension market, Keylane enables its customers to fully comply with the latest rules and regulations.



Complete traceability and control

All transactions are composed of events, and this approach provides users with full control over accounts through convenient undo and redo options, and complete traceability of account history.



Modules to individualise your system

Plexus comes with a series of add-on modules to ensure complete solutions for large and small pension providers alike. There are modules for handling various situations in relation to workflow, receiving and paying money, reporting, legal parties, claims, documentation and more. You can choose to use any number of modules, selecting only those required relative to existing functionality and business needs.

Business Agility

With straight-through processing, Plexus enables insurers and pension providers to handle quotes, policy applications and alterations quickly and efficiently. New products are easily launched, and complex business processes are handled within minutes. Giving you the business agility that is needed for a truly digital pension provider.

Plexus empowers the life and pension industry to change through technology. The landscape changes, so does the way we interact.

Make use of 100% web-based software in a secure private cloud environment. Robust, scalable and fully integratable with your own application landscape. No need to worry about installation, configuration, performance, upgrades, maintenance or disaster recovery - we take care of it.

Employee | Intermediary | Customer | Business partner

Plexus UI

Intermediary systems

App
Website

3rd party development

Plexus Service Layer

Internal Systems

- CRM
- General ledger & finance
- Enterprise workflow
- Data warehouse
- Funds/AM/Banks

- All-in-one policy
- Claims
- Policy management
- Data Mart & reporting
- Workflow
- Unit Linked
- Employment
- Analysis
- Core engine
- Legal party
- Agreements
- 360° customer view
- Product management
- Collections & disbursements
- Reinsurance

- Customer journey
- Financial planning
- Risk management

External Services

- Banks
  Transfers
  Salary systems
- Authorities
- Mail
  Digital documents
  Print
  Scanning

All-in-one policy

Only one policy for every agreement with the end customer enables you to have multiple risk covers, savings and group covers under a single policy. This ensures effective administration and improved customer experience.

Claims

Handle claims fast and 100% digitally using straight-through processing. The user-friendly interface provides you with all the needed features to ensure smooth and fast handling of customer claims, increasing staff productivity, and most importantly, customer satisfaction.

Policy management

Use flexible and smart workflows to create straight-through processes from request to policy administration. With a full audit trail for historic, current and future policy versions. Organise policies in packages or group contracts.

Data Mart & reporting

You can systematically contain and exploit all relevant data from the production system. You can create SQL reports and reconcile data, such as payments processed out versus payments disbursed. The module applies a series of batch jobs, each one designed to output a specific report in either Excel or PDF format. You can set each report with its own format and its own cycle.

Workflow

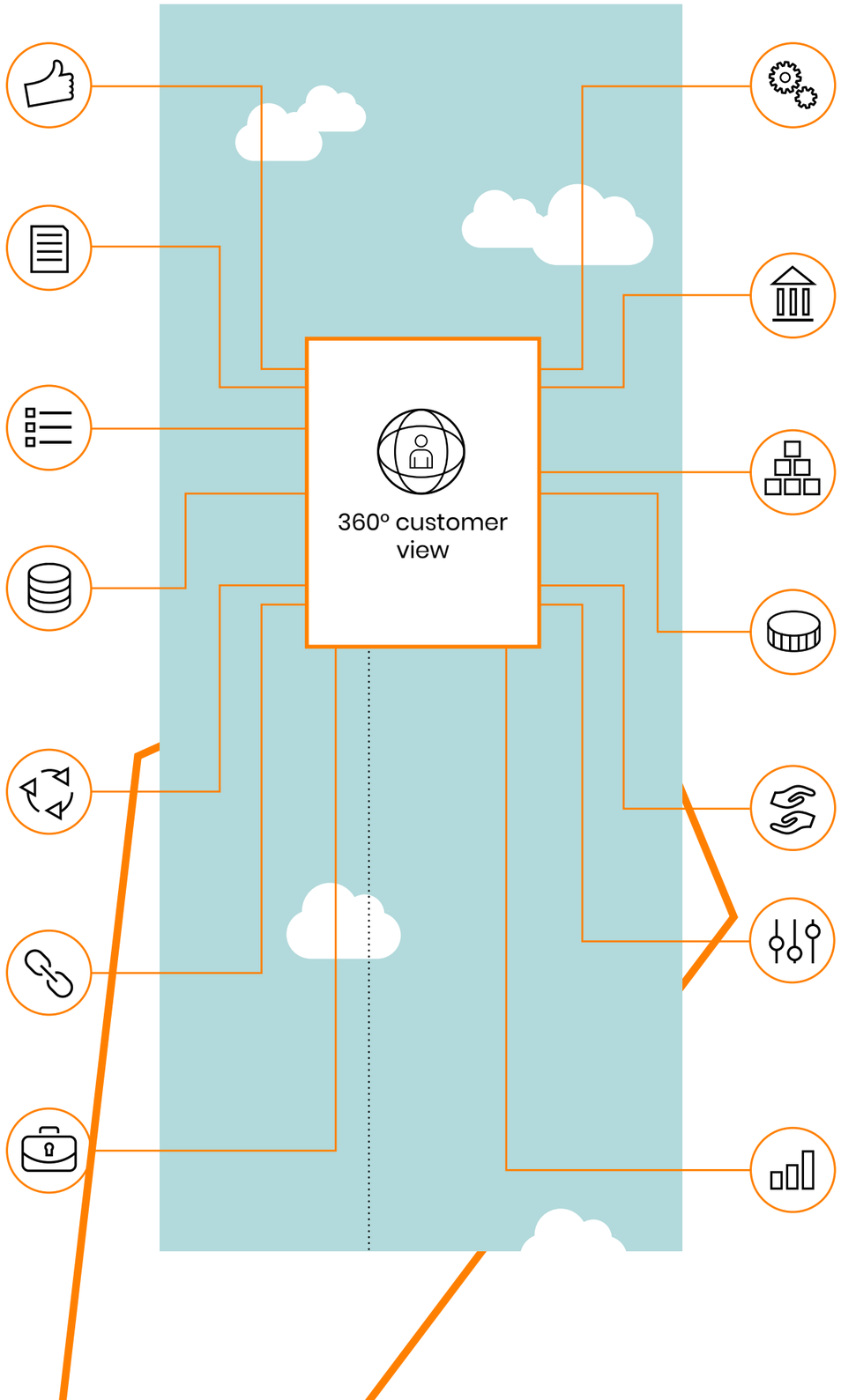
Define, combine and automate your business processes, while minimising errors and enhancing your case handling efficiency. View a graphical representation of each workflow instance that has taken place, allowing for a faster and superior customer service.

Unit Linked

Easily create unique unit linked and life cycle offerings, with full control and visibility over individual choices such as rebalancing and trades. Continuously redefine and self-model your offerings, whilst easily introducing new life cycle products to your customers.

Employment

Handle a person's employment, occupation and salary administration with ease. Employment records are version controlled, allowing for flexibility and traceability in the way they are used and managed.



Core engine

The core engine is the dynamic heart of the Plexus platform. It contains the foundational elements, calculations, rules, framework and core functionality of Plexus. You can enter all your business rules and procedures into the core platform, thereby employing this powerful validation engine for handling all insurance or pension policy changes.

Legal party

Manage all data about the different legal parties within the system. You can gather detailed data on your customers, i.e., persons and companies, and information about relevant authorities, doctors, brokers, etc. You can integrate the module with your own CRM system, or with registries outside your company.

Agreements

The Plexus agreement structure makes it easy to create, maintain and update your different products, trade union agreements and company-client agreements, ensuring fast time-to-market and high-quality data profile across your product range.

Collections & disbursements

Fully integrated accounts administration for collections and disbursements. The module performs calculations accounting for tax regulations in the specific country, applies the correct format for sending money, e.g., bank account or cheque, and makes the settlement with relevant authorities.

Reinsurance

Manage proportional and non-proportional re-insurance contracts and continuously maintain the financial positions of the insurer and re-insurers.

Product management

Manage and store all communication instances with customers, intermediaries and partners based on a wide range of document and output options for optimally assisting your workflow. Configuration to defined benefit and defined contribution plans is available. Creation of PDF files, emails, and hard copy are all standard features, and Plexus document functionality is very easy to integrate with any output system.

Analysis

Use sophisticated analysis and projection tools to provide your company the means to quickly adapt to product, policy or strategy changes, while providing

If you want to go fast, go alone. If you want to go far, go together.

With a dedicated implementation team of experienced insurance and pension consultants and the best practices we developed over the years, you are assured of a smooth implementation of Plexus Our customers can affirm that we always live up to our promises.

Consultancy

Keylane consultants are fully focused on the pension and insurance industry. With over twenty years of experience in these sectors and a specialist approach for each segment. They always keep a keen eye on new developments in the market and the opportunities they offer for you. Our consultants work closely together with you to prepare comprehensive business cases for the implementation of Axon or new Axon functionalities. Always aimed at clear and measurable business benefits in terms of reduced time-to-market of new products, IT cost cutting, and higher customer satisfaction figures.

Implementation

At Keylane, we have over twenty years of experience in software implementation within the complex environments of major insurers and pension providers. In over 90 successful projects we have developed an effective, standardised work process that we continually improve and update with every new project. An agile approach based on active user involvement and risk reduction through best practices, that guarantees predictable project deliverables and fulfilment of your business goals. Based on well-known various IT development and implementation methods like SDM, DSDM, Agile and Scrum.

Migration

When implementing a new software platform, data migration can become a challenging and expensive affair. That is why we have a dedicated competence centre for data migration, that helps our clients to carry out migrations in a completely controlled way. Converting data using a proven, standardised and fully automated method with intensive testing of the design, theperformance of the migration and the conversion software before migrating your actual data.

High customer satisfaction and low administrative costs

"The implementation of Keylane Plexus has made it possible for us to focus on the strategic development of our business. We have streamlined our business processes and given our customers exceptional self-service opportunities – we are now among the companies with the lowest administrative costs in the market.

In our day-to-day work with Keylane, we experience a business partner that understands the industry and knows what steps to take to strengthen our business. This innovative and challenging approach of Keylane sets new standards."

Søren Kolbye Sørensen, CEO at DIP

All-inclusive high standard pension planning

"The launch of "Pensionstjek" has strengthened Sampension's efforts to deliver an all-inclusive, high standard pension planning. All necessary financial conditions are included when the plan is tailored to the customer's individual needs and life situation.

With "Pensionstjek" Sampension will strengthen its position and become market leading among labour market pension providers."

Ole B. Tønnesen, Director at Sampension

Keylane: key to opportunity

Meeting the complex demands and dealing with the unpredictable future of the digital world presents a significant challenge to insurance and pensions providers.

The speed of change and need for compliance makes it almost impossible to run an effective business without a platform that meets these demands.

Keylane is an industry-leading SaaS provider that uses its market knowledge, scale and experience to reduce complexity and unburden clients, allowing them to focus on their core business.

Our ambitions are to enable the industry to change and to empower our clients to innovate and stay competitive in an ever-changing market.

Some of our clients

- a.s.r. de nederlandse verzekerings maatschappij voor alle verzekeringen
- sampension mere værd
- Topdanmark Forsikring • Pension
- Velliv
- Allianz
- achmea
- Alm Brand
- AP Pension
- DIP
- forca
- jøp Råd til et langt liv
- NN
- Loyalis een merk van a.s.r.
- pensioenfonds PGB

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