



Wipfli Software Selection for Insurance

Experienced and objective guidance through the maze of options.

Wipfli Software Selection uses best practices, looks out for your best interests, and helps you get your best solution.



The Wipfli Software Selection service reduces your selection risks with a disciplined approach. We seek first to understand your unique business. We provide an objective analysis regarding the differences between solutions, their feasibility, and their fit to your organization's requirements. Our insurance industry experts have been on the buying side of the table and on the vendor side, giving us a unique perspective when it comes to package software selection. We are also experienced implementers, so we understand the nuances of choosing a vendor and implementing their software.

Find the right solution faster and at a lower cost. Our agile approach is a streamlined yet thorough approach to get you to a quality choice.

Reduce uncertainties and mitigate the risks. Following a proven methodology combined with expertise and experience helps reduce the risk of making bad—and costly—choices.

Find your vendor comfort level. From relevant demonstrations to on-site visits, we short list the best, then help validate and assess the right vendors.

Ensure a sound decision. We help separate the emotion from the substance of a solution, keeping you focused and guiding you to your best choice.

WIPFLI^{LLP}
CPAs and Consultants

www.wipfli.com/insurance



RIP RFPs

Selecting new technology to replace an old core system is one of the most important decisions an insurance company will make. It's an already intimidating process made even more challenging given its infrequency and importance. Typically, insurance companies pursue the initiative once every 10 or 15 years for a solution that must prove useful for just as long. The cost of a bad decision can be catastrophically expensive in the implementation phase. We will help set you up for a successful implementation during the selection process.

In addition to the significant financial investment, your selection will change your business processes, require organizational change management, and entail an implementation timeline that stretches over months. It takes much more than an RFP to make a quality choice. There is a better way.

Determining the best choice for your company requires careful research and thought...and quick!

Wipfli Software Selection is a commonsense, agile approach to vendor selection, including a set of methods that are tailored to your company. While your core system replacement process may be a once-in-a-decade endeavor,

we routinely lead initiatives that help insurance companies make the right decisions. So you can find your best solution faster and with confidence.

Wipfli Software Selection helps your company identify those requirements that are key to your vision to save time and money. Selecting a packaged application involves more than your business requirements and vendor software, so our framework includes identifying constraints, evaluating vendor stability, checking references, and understanding their implementation methodology.

Choose wisely.

Choosing the right software solution is not easy. Policy, billing, and claims systems have been highly automated for decades now. With so many choices that all "look" alike and a glut of vendors, many of whom are constantly changing or "disappearing," making a prudent selection is a considerable challenge.

Wipfli Software Selection cuts through the clutter to hone in on a short list of the most relevant and reliable vendors for your needs. Our experience lets us recognize the nuances in vendors and their offerings.

Wipfli Software Selection for Insurance uses a proven methodology and objective measures to support your best interests.

- **Determine the business drivers.** This is so much more than "an IT project." We dig deep to help you clearly understand the business rationale behind your search.
- **Develop the business case.** We anchor your rationale to control scope and keep you focused on the right solutions. We also make certain you understand the full costs (one-time and ongoing) as well as the risks and benefits behind your direction.
- **Follow the process.** We know the way to a successful selection. We'll help you identify constraints; define functional, technical, and other requirements; evaluate the benefits; and determine vendor viability.
- **Make the choice.** We will narrow the field, put vendors to the test, and help you evaluate your most viable options so you make the right decision with utmost confidence. We will also ensure you have a clear contract and maintenance agreement that's fair to your organization, not a stock, vendor-favored contract.