**Q1: Contact Information**

| | |
|---|---|
| Name: | David THOMAS |
| Company: | EFFISOFT |
| Address: | 24, Lime Street |
| City/Town: | LONDON |
| ZIP: | EC3M 7HS |
| Country: | UNITED KINGDOM |
| Email Address: | contact@effisoft-group.com |
| Phone Number: | 44 207 626 5177 |

**Q2: Company Website**  www.effisoft.com

**Q3: Product NameNote: Please include all names of systems currently supported**

Webrisk

**Q4: Technology Deployment Options**  Web: Vendor Hosted (ASP

**Q5: Lines of Business Supported**

| | |
|---|---|
| State WC | Custom |
| Federal WC (USLH, Jones Act) | Custom |
| General Liability | Standard |
| Auto | Standard |
| Property | Standard |
| Professional | Standard |
| Disability | Standard |

**Q6: Other lines of business supported**  *Respondent skipped this question*

| **Q7:** **Other related functionality** | Policy Administration,<br><br>Underwriting/Rating (Please list lines of business)<br><br>,<br><br>Member Portal,  Billing,  Reinsurance/Excess,<br><br>Agency Fee Commission tracking |
| --- | --- |

**Q8:** **Please describe your system's document management capabilities.**

Webrisk is delivered with a CMS tool. You can attach files to any entry in the system and then consult/edit them.

| **Q9:** **Do you provide user-defined fields?** | Yes |
| --- | --- |

**Q10:** **Please identify all of the browsers supported by your system, including the earliest versions (i.e Internet Explorer 9)**

IE 9-10-11 and former versions
Chrome

**Q11:** **Please list the levels of hierarchy of your RMIS**

The users can define several levels so as to describe their group's structure as precisely as possible in various Business Units (company, subsidiaries, sites, ...). This structure will allow us to define user rights and reporting by Business Units.

**PAGE 3: SYSTEM FUNCTIONALITY**

| **Q12:** **Dashboards and Alerts** | |
| --- | --- |
| Configurable dashboard | Configurable |
| Downloadable | Configurable |
| Email alerts | Configurable |
| Dashboard alerts | Configurable |
| Clmt. Search from home page | Standard |
| Multi-level hierarchy | Standard |
| Multi-currency | Standard |
| Multi-lingual | Standard |
| **Q13:** **Maximum amount of dashboards allowed by your system** | Unlimited |

**Q14: Please describe any unique dashboard or alert that we did not list above**   *Respondent skipped this question*

**Q15: Standard Reports**

| | |
|---|---|
| Scheduled reports with auto distribution | Standard |
| Report Bursting | Standard |
| Ad hoc reporting | Configurable |
| "As of" date reporting | Configurable |
| Searchable PDF reports | Standard |
| Download to Excel and PDF | Standard |
| Offline data manipulation allowed | Unavailable |
| Policy Erosion reports | Configurable |
| Loss triangles for data development and trending | Configurable |
| Deductible reimbursement tracking | Configurable |
| Profiling, red-flagging events | Configurable |
| Goal tracking | Configurable |
| Loss forecasting | Configurable |
| Experience Modification | Configurable |
| Cost of risk/premium allocation | Configurable |
| Underwriting/rating calculation | Configurable |

**Q16: Policy and Exposure Tracking**

| | |
|---|---|
| Policy tracking (list of policies) | Standard |
| Policy management (details of policies) | Standard |
| Underwriting | Standard |
| Certificate tracking | Configurable |
| Certificate issuance | Configurable |
| Property tracking (values) | Configurable |
| Safety/loss control analysis | Configurable |
| Bonds/contracts tracking | Configurable |
| Asset Management | Configurable |
| COPE Tracking | Configurable |
| Fleet Management | Configurable |
| Integrated Policy Management | Standard |
| Basic Values / Exposures Entry | Configurable |
| Retention vs Premium Calculator | Configurable |
| Coverage Gaps and Overlaps | Standard |
| Intelligent Mapping | Configurable |

**Q17: Analytics & Metrics Analysis: Please describe any third party software used to perform business analytics**

JasperSoft (a TIBCO product)

**Q18: Typical Analytics/Metrics reports**

| | |
|---|---|
| Key Performance Indicators (KPI) measurements | Configurable |
| Loss Forecasting | Configurable |
| Cost of risk allocation | Configurable |
| Heat Map reports on loss distribution/location | Configurable |

**Q19: How, if at all, does your RMIS compare client data to non-client data?**    *Respondent skipped this question*

**Q20: Please describe any features or functions that are designed to support enterprise risk management processes:**

Risk Mapping (identification and assessment)
Compliance

**Q21: Please provide a list of current innovations that you are currently working on to deploy at a future date**

Customizable portal
Geographical

| **Q22: Other notable features or comments** | *Respondent skipped this question* |
| --- | --- |

PAGE 4: Claims Self Administration Features

**Q23: Please describe how your system develops a TCOR (total cost of risk) estimation**

Templates are bespoked to match each clients own TCOR methodology.

**Q24: Please describe your business process / workflow collection tools**

Webrisk includes fully integrated and flexible process/workflow functionnality.

**Q25: Claims management features**

| | |
| --- | --- |
| Customizable Diary | Standard |
| Adjuster Notes access (if applicable) | Standard |
| Reserve Analysis (worksheet) | Standard |

**Q26: Claims administration features**

| | |
| --- | --- |
| Incident Tracking | Standard |
| Check writing | Standard |
| Utilization review | Standard |
| Medical Bill Repricing | Custom |
| Transitional Work Management | Custom |
| Built-in Reserve Estimation Worksheets | Custom |
| Fraud Detection capability | Custom |
| Encryption of sensitive data | Standard |
| Subrogation & Salvage Tracking | Custom |
| Comprehensive Litigation Management Tracking | Standard |
| Adjuster Tracking/Performance | Standard |

**Q27: Third party reporting and documentation**

| | |
|---|---|
| OSHA reporting | Standard |
| NCCI Reporting | Custom |
| 1099 Reporting | Custom |
| First Report of injury | Standard |
| FROI/SROI reporting | Standard |
| CMS reporting | Custom |
| EDI reporting | Standard |

**Q28: Other notable features or comments** — *Respondent skipped this question*

PAGE 5: Software, Technology and Security

**Q29: Did your organization develop the software platform your solution resides on?** — Yes

**Q30: If another organization develops the software platform your solution is based upon, please describe this relationship.** — *Respondent skipped this question*

**Q31: Who maintains your software platform?**

We maintain our platform

**Q32: What software is used to track your RMIS solution's defects, bugs, and problems?** — *Respondent skipped this question*

**Q33: Do you have a need to develop software outside of your primary platform?** — No

**Q34: If so, what applications are involved?** — *Respondent skipped this question*

**Q35: What third party vendors do you partner with to provide functionality?** — *Respondent skipped this question*

**Q36: Does your firm use off-shore resources at all?** — No

**Q37: Who maintains your software infrastructure?**

We maintain our infrastructure

**Q38: Are there multiple, separate data center facilities used to host data for global clients?**

Yes

| | |
|---|---|
| **Q39: Do you provide the ISO 27001 certification to your clients?** | No |
| **Q40: Does your solution allow for full encryption at rest for all client data in all hosting facilities used by your organization?** | Yes |
| **Q41: Does your solution provide the ability to encrypt specific fields while at rest?** | Yes |
| Q42: What technology/data standards are used/supported by your application? (e.g. WSI, WSS, ACCORD XML) | *Respondent skipped this question* |
| Q43: Describe encryption protocols used within, and in communication with, the product. | *Respondent skipped this question* |
| Q44: Describe any API offered | *Respondent skipped this question* |

**Q45: CLIENT HOSTED DEPLOYMENTSMinimum recommended hardware requirements and any third party software licensing requirements**

Thin client, only a web browser and MS Office are required

**Q46: CLIENT HOSTED DEPLOYMENTSDoes the product support, and has it been tested with, virtualization software (VMware)?**

Yes

| | |
|---|---|
| **Q47: VENDOR or THIRD PARTY HOSTED DEPLOYMENTSSAS 70 audit (vendor/third party hosted versions only)** | None |
| Q48: Does your company purchase cyber risk coverage to protect your clients' data assets? | *Respondent skipped this question* |
| Q49: Any additional comments related to software, technology and security | *Respondent skipped this question* |

| | |
|---|---|
| Q50: List standard insurer/TPA interfaces (in order of frequency) | *Respondent skipped this question* |

**Q51: Please describe your approach to state EDI compliance (e.g. vendor partnerships) and the breadth of your existing capabilities.**

*Respondent skipped this question*

**Q52: Other System interfaces**

| | |
|---|---|
| User authentication (e.g. LDAP) | Configurable |
| HR Payroll | Unavailable |
| Accounting | Configurable |
| External Document Management Services | Standard |
| External Bill Review Services | Configurable |

**Q53: Other interfaces not listed above**

*Respondent skipped this question*

**Q54: What is your hourly rate for custom interface work?**

*Respondent skipped this question*

**PAGE 7: Training, Support and Customer Feedback**

**Q55: Briefly describe your standard training approach (when and to whom) and your methods utilized**

Software is sufficiently intuitive for all users except administrators for whom 1 day face to face training is provided.

**Q56: Number of staff dedicated to training and/or support**

10

**Q57: Support types offered:**

Dedicated (not pooled) support person,

Online help, Print user manual,

Screen "tips" or mouse-overs, Video tutorials

**Q58: Telephone support hours**

*Respondent skipped this question*

**Q59: Position regarding support of prior product versions**

Fully supported

**Q60: Do you host a user conference?**

No

**Q61: What was the date of your last user conference?**

*Respondent skipped this question*

**Q62: How many customers / prospects were in attendance?**

*Respondent skipped this question*

**Q63: What other methods do you use to obtain customer and/or prospect feedback and input on feature priorities?**

Quarterly review meetings with all clients.

**PAGE 8: Implementation**

**Q64: Describe your delivery team's structure:Do you have a dedicated service team approach or does one account executive handle multiple responsibilities?**

Dedicated service team

**Q65: Do you have dedicated business analysts?**

Yes

**Q66: Describe your process of tracking delivery team activities**

Internal project management software

**Q67: Do you have a defined methodology for implementing projects?**

Yes

**Q68: Do you have a defined oversight or governance process for your implementations?**

Yes

**Q69: How long is the typical implementation time?**

3 months

**PAGE 9: Business Information**

**Q70: What was the year of your first RMIS implementation?**

1992

**Q71: Parent Company (if applicable)**

*Respondent skipped this question*

**Q72: Business Locations**

Paris (France), London (UK), Dallas (USA)

**Q73: Top Officers**

| | |
|---|---|
| Top Executive 1: | Pascal STOPNICKI (CEO) |
| Top Executive 2: | David THOMAS (CEO, UK) |

**Q74: Number of employees (RMIS division only) in 2013**

| | |
|---|---|
| Total Employees | between 40 and 70 |

**Q75: Number of employees (RMIS division only) in 2014**

| | |
|---|---|
| Total Employees | between 40 and 70 |

**Q76: Total annual revenue for all product versions offered**

>11M€

**Q77: Approximate percent of revenue spent on R&D**

15%

**Q78: Customer Statistics**

*Respondent skipped this question*

**Q79: Largest customer markets (Please rank top 5)**

| | |
|---|---|
| Energy | 4 |
| Financial | 2 |
| Hospitality/Entertainment | 5 |
| Manufacturing | 3 |
| Transportation | 1 |

**Q80: Please rank order how you obtain most new accounts (unbundled systems only)**

| | |
|---|---|
| Competitive RFPs | 1 |
| Sole source (no competition) | 2 |
| Client merger/acquisition | 3 |

**Q81: Top 5 RMIS competitors**

*Respondent skipped this question*

**Q82: Predominant programming language**

.Net / C#

**Q83: Databases supported**

Oracle,  Microsoft SQL Server

**Q84: Please identify all mobile devices that can be used by your system**

*Respondent skipped this question*

**Q85: Please list the RMIS-related revenue for the following years:**

*Respondent skipped this question*

| Q86: **Please identify all revenue-generating activities:** | Software license sales, Custom applications, Data Conversion and Consolidation activities, Consulting, Ongoing maintenance |
| --- | --- |
| Q87: **Please indicate the percentage of revenue derived from these activities:** | *Respondent skipped this question* |
| Q88: **Does your RMIS act as a "channel partner" for any 3rd party information or a la carte services?** | *Respondent skipped this question* |

**PAGE 10: Pricing**

| Q89: **Pricing approach for ongoing usage (check all components that drive cost for client; do not check if no charges associated)** | Site license, Module/LOB pricing, Data conversions/feeds/EDI, Maintenance, Training, Integration with HR, A/P systems |
| --- | --- |
| Q90: **Approximate total annual cost (ranges) excluding initial implementation** | *Respondent skipped this question* |
| Q91: **What are the associated fees and hourly rates to implement your system?** | *Respondent skipped this question* |
| Q92: **What is the typical one-time cost to implement your system?** | *Respondent skipped this question* |
| Q93: **Additional comments on pricing** | *Respondent skipped this question* |

**PAGE 11: Other Information**

| Q94: **Please comment on your recent system uptime/availability performance, as well as methods that you use to measure and monitor it.** | *Respondent skipped this question* |
| --- | --- |

Q95: **Please describe if your RMIS is multilingual.If so, please list the other languages supported.**

French
English
Spanish

| Q96: **List the top 3 reasons that you believe set you apart from other RMIS vendors** | *Respondent skipped this question* |
| --- | --- |