



Custom Solutions for the Insurance Industry

Implementation of Agency Information Manager (AIM) Enhances Productivity at Delta General Agency

AGENCY INFORMATION MANAGER CUSTOMER

Delta General Agency Corporation

CORPORATE PROFILE

Headquarters
Houston, Texas

Type of Agency
Managing General Agency with
brokerage operations

Lines of Business
Personal Lines
Commercial Lines
Specialty Programs

Other Considerations
Premium Financing
Claims
Insurance Company

SYSTEM PROFILE

Environment
Windows 2000, Microsoft SQL Server
and Exchange

Modules in Operation
Agency Information Manager
NoteMaster Plus

THE CHALLENGE

For 2 years, Delta General Agency had been searching for a comprehensive agency management system that would automate their wide-ranging operations and would integrate with existing legacy systems that were vital to the operation.

Concurrently the firm began shifting to the Microsoft Windows 95 environment on the Windows 2000 network. Although Delta had a system in place that provided capable accounting information services, and they sought a solution that was compatible with the Microsoft SQL Server environment and could be customized to be accommodate their diverse insurance operations and needs. They found most agency management systems as having been developed in outdated technology or too inflexible to their customization capabilities.

“Other agency management vendors systems could not meet our requirements for open architecture and rapid customization. For example, we could not control the format and content of our quotes, binders, and other routine correspondence like having a premium finance information included in a quotation letter.” said Jose Ortiz, Systems and Technology Manager for Delta General Agency Corporation.

THE SOLUTION

Delta conducted a careful assessment of numerous high-performance insurance agency management systems, considering offerings from all the leading vendors in the marketplace.

“We evaluated AIM and a number of other packages, and decided that AIM from Custom Insurance Solutions was the best fit for us.” said Delta’s Ortiz. “We found AIM to be the best performing application that was designed with the right tools to allow for on-going customization to our ever-changing and unique needs.”

“I am delighted by AIM’s ease of use, its full integration with our applications, and that it could be customized to our environment. It will be Delta General’s agency management foundation for years to come.”

**Bill Fink
President
Delta General Agency Corporation**

Ortiz also noted that AIM was constructed using the latest application development tools, and designed from the ground up to be compatible with 32-bit Windows operating platform. “AIM is newly designed in Borland Delphi as a native 32-bit application, and is SQL Server based.” The other agency management software packages that Delta found unacceptable were developed in DOS or for 16-bit Windows 3.1.

The product’s 32-bit technology allows Delta to take full advantage of Windows 2000 ease of use. “AIM is built for Windows 2000, not Windows 3.1, so it is much more efficient. It is highly stable, and due to its open system architecture can bridge and share data with my other systems.”

While installation of some client/server software systems traditionally consumes months, AIM was brought into service in a remarkably short time – less than two months, including installation, training, and data conversion. This project went smoothly for two reasons: its client/server architecture and its development using industry standard tools. AIM, which is designed to be Microsoft compliant, integrates with other software within the enterprise.

Bill Fink, Delta General’s president, praises the system’s customization and flexibility. “I am delighted by AIM’s ease of use, its full integration with our applications, and that it could be customized to our unique environment. It will be Delta General’s agency management foundation for years to come.”

Custom Insurance Solutions

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