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# INSURANCE & TECHNOLOGY

## CFG Anchors Tech Transformation on FIS ALIS Policy Admin Platform

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AS [Columbian Financial Group](#) (CFG, about \$175 million in collected premium income) nears the completion of its fourth merger since 2003, the Binghamton, N.Y.-based life insurer has activated a five-year plan to establish a unified technology platform based on FIS' (Cardiff, U.K.) [ALIS](#) policy administration platform.

CFG's recent mergers include Atlanta-based UNIO Group in 2003, Philadelphia-based Philanthropic Insurance Companies in 2006 and Syracuse, N.Y.-based Farmers & Traders Life Insurance in 2006. The carrier has also signed a letter of intent to merge with Mutual of Detroit Insurance Co. (Plymouth, Mich.) by the end of 2008. As a result of the mergers, according to Peggy Rubin, senior vice president of operations, CFG, "We had five policy admin systems in four locations. We were struggling to deliver new products in a timely fashion, and with every merger, our technology environment grew more complex."

To simplify the environment, CFG sought a browser-based policy administration solution that would provide a single platform for all of the company's locations, result in lower total cost of ownership, deliver greater product speed to market and improve service to distributors, Rubin reports. "We wanted to develop tighter integration between support systems, such as our imaging and workflow and document management, and we wanted to simplify all of our hardware and software," she adds.

### Five-Year Plan

CFG developed a five-year strategic plan in 2007 that included its decision to purchase FIS' ALIS solution as its policy administration platform. Having compared ALIS to other packaged solutions, CFG chose the FIS offering because, according to Rubin, "ALIS has rich functionality and provides a robust set of configuration tools that will allow our IT staff to be self-sufficient in support of our future new business, policy administration and agency management needs."

Phase one of the five-year plan calls for implementing ALIS and going live with three products, beginning with the carrier's new Single Premium Whole Life product, on November 1. Conversion from the Atlanta system is scheduled before year's end, and system testing will begin in August. "We're in the process of not only building the three products but all of the integration points, including the workflow and imaging," Rubin says.

### First U.S. Customer

CFG completed implementation of an upgrade to its imaging and workflow solution by [Vignette](#)

(Austin, Texas) in May and will roll out an updated [Skywire Software](#) (Frisco, Texas) document management solution to coincide with the rollout of ALIS. (Editor's note: At press time, Oracle Corp. announced plans to acquire Skywire; see related article on page 14.) Rubin reports that CFG has relied on those vendors as well as FIS and IBM for consulting services. Through FIS, the carrier counted on Downers Grove, Ill.-based consultant Hamilton Smith Associates for ALIS-related compliance concerns. "We are [U.K.-based] FIS' first U.S. customer, so there were many regulatory issues," Rubin says.

Among the other challenges CFG faces is establishing best practices at its various locations to correspond to the systems consolidation. CFG will convert existing products and add new ones in subsequent project phases. "Another goal is to get off our two systems in Philadelphia and merge those in 2010," Rubin says. "In 2011 we intend to convert all of our ordinary and paid-up policies."

CFG plans to take regular upgrades on the system but wishes to be independent from the vendor for new product configuration and non-core policy administration development. "We are utilizing the FIS team for the initial implementation of phase one and also to train our IT group in the use of the system," Rubin says.

With the implementation of ALIS, CFG expects to achieve several of its goals, including lower TCO, by establishing consolidated systems and practices. With regard to a return on the investment, Rubin says, "The breakeven will probably be in the fourth year, but we expect better than 20 percent ROI."

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