

Insurance Brokerage Software that's ... easy, robust, fast, reliable, secure, adaptable

An Introduction to the Design Principles behind CIM-Data Software

CIM-Data Software has had a long evolution from Minicomputers to today's high-speed Servers. Originally based on paper-based accounting systems, Insurance Brokerage Accounting remains the core of our system, but it has grown to encompass much more.

Getting to know what a software system is all about in a short time is often frustrating, so we have designed this publication to help introduce you to the six main design priorities that has guided our software development. We hope you will gain a little insight into what we are accomplishing in our product.

Software that's easy...

Easy is a short, small word and it can quickly be brushed aside as a trifling marketing statement. But to design "easy" into a system is not a trifle. Sometimes, to get software to be truly easy can consume considerably more time, effort, and cost than doing just a basic design. An easy system looks simple, seems simple, and acts in a simple way, even if it is performing remarkably complex or multifactorial operations behind the scenes.

When we contemplate "easy software", we need to contemplate the levels of 'easy'. From the basic user's point of



view, we mean it to be software that can be learned quickly, whose functionality can often be surmised simply by clicking here and there, whose operation can be learned in a few moments, and that requires a minimal amount of effort to accomplish tasks.

When a CSR is focussing on a client, he or she should not have to re-direct concentration to his or her system. Access to functions should be simple and immediate - so concentration remains with the client.

At a manager's level, it means software that is safe and that every client service activity is completed, and completed professionally, timely, and without error.

From a system managers point of view, easy software has a minimum of maintenance requirements, that installs, uninstalls, backs up, and restores in a minimal amount of time. It also means software that can protect itself from hardware problems by monitoring conditions that could kill other software systems. It also means software that manages its own backups, to ensure continuous operation.

For everyone involved in the system, easy software is quick to learn, painless to use, and simple to troubleshoot.



Software that's robust...

Robust suggests various things, but let us be clear: we mean robust to include the notions of strength, vigour, richness, and capability. It implies a completeness of design that is versatile enough to handle diverse situations well. Building robustness into software can only come from two things: first, a lot of experience, and second, a continuing willingness to discover with users, new concepts, issues, and situations to handle.

Robustness is exhibited by the way a system implements the details. A mature software system has detail handling built-in. A weak system chokes on things it doesn't know about.

We believe we have accumulated a full breadth of experience by working with our customers, their users, technicians, managers, and owners, and have added the level of detail needed to make our software truly "robust".

Software that's fast...

Speed is subjective. Yet, we receive feedback from people using our software for the first time, of how quick something is. Both "fast" and "easy" can be related. Something that is easy to work with is usually quick too. But whereas designing "easy" is more related to user interfaces, workflows, and interactions, designing speed in software, is more related to how the non-visible, underlying mechanisms are architected and built.

Given any particular software objective, there is often more than one way to deliver a solution. But when the delivery also mandates performance, software development can be steered in quite a different pathway. Sometimes, plain simplicity yields the best performance, but other times, implementing advanced computing concepts that actually introduce a high degree of complexity can yield remarkably improved performance.

Other times, all it takes, is someone to sit



down and say, "Hey! Here's a simpler and faster way to do this." By acting on these ideas, experimenting, and creating new approaches, CIM-Data has over the years, discovered and implemented new ways to make not only the software fast, but ways to make managing the software quicker.

Software that's reliable...

Well! What good is software that can't be counted on? With all the things that can go wrong with a computer system, its surprising more disasters don't happen. Yet we've seen our customers face all sorts of surprising reliability issues, and guess what? We've designed against them! Our zFiler database is absolutely the most reliable and recoverable database used by brokers - it can often even warn of a hard drive crash days before it happens!

Other issues such as account locking are fully implemented. If you have ever experienced the aggravation of having to re-enter data because of inadequate data locking, you will appreciate how CIM-Data's energies in building proper database locking into the lowest levels of our code results in only having to enter data once - because it will always be accepted and will never have to be re-entered (barring hardware malfunctions).

All this means that CIM-Data users get to use software that has high up times and that will protect itself and your data from the threat of malfunctioning hardware that might cause extensive data damage before it is detected.

Software that's secure...

Today's insurance brokerage databases and servers contain confidential client information such as credit card numbers, bank account numbers, policy numbers and other personal data. They also contain records of correspondence.

Secure software can be configured to protect your data and your client's data from both hackers and internal staff from theft, tampering, or accidental damage.

A software system designed for security should be designed to interact with domain controllers and terminal servers and include standard security scripts to ensure all aspects of its setup, operation, and data remain secure.

Office administrators should be able to control what data and operations each user is allowed to access in accordance with their responsibilities and abilities and track what user did what and when.

CIM-Data addresses security at several levels and includes help files, scripts, training, and even a remote administration service to ensure your servers and data are fully protected.

Software that's adaptable...

CIM-Data software was built from the ground up with both modularity and configurability in mind. It is easy for us to add new or unique capabilities and even build customized modules for special needs. Some of the best ideas in the system have come from users, and we wel-



come new ideas. Many of them actually become incorporated over time, enriching our product for all users.

Summary...

Many of our users have told us that they can get more done per day on CIM-Data than on any other system. Many have also exclaimed how they really enjoy the look and feel of our software. Others have remarked on how well they can control their receivables, save time doing EDI, or how quickly they have trained a new user. And others have told us that with the built-in efficiencies of our software and support department, they actually save money on hardware support and accounting fees.

These kind of results can only happen when software is purposefully built to deliver ease of use, comprehensive capability, speed, dependability, safety, and versatility (easy, robust, fast, reliable, secure, adaptable). We hope you agree that these are principles worth designing for, and worth installing in your brokerage!