NBe Brokers Case Study

open gi

"With Core Cloud we're saving time, improving efficiency, increasing accuracy — and focusing on our customers. As a result, we've been able to grow our customer base, our product lines, and our GWP."

Commercial broker NBe was established in 2023 by Phil Warburton and Shaun Hollins, taking their combined 30 years of experience in the insurance industry to create a brokerage based on strong relationships with insurers - and even stronger relationships with customers.

Delivering an expert, human service is key to NBe's proposition, but they needed the right technology behind the scenes to help their underwriters and customer service staff focus on customers at key touchpoints in their journey. They switched over to Open GI after a false start with another provider.

Simplicity and Scalability

Phil explains: "To put it bluntly, we weren't getting what we needed from our original supplier. When we started looking for an alternative technology partner, Open GI really stood out to us."

"Frankly it was the only one I could make sense of," adds Shaun. "We got shown a number of potential systems, but too many of them were just too confusing. I didn't want to spend hours learning a new system, I wanted something that I — and all our other departments - could take out of the box and start using. That's what you get with Core Cloud."

"We needed something that was really user friendly, for both our customer-facing teams and for our tech guys in the background," agrees Phil. "Core Cloud is incredibly easy to navigate on the front end, and familiar to a lot of insurance professionals already. You can also do so much to tinker with the backend too, and tailor it to your own requirements.

Shaun continues: "It means every time you want to make a change, you can do it yourselves, so you're not being held hostage to a ticket and waiting on your software house to get round to your job. What's more, it's a really scalable solution too, so it builds as we build."

Supporting Growth

NBe is now a business of 17 people, based in Stoke-on-Trent, with ambitions to grow even further and faster.

Phil explains: "We deal with a wide range of policies from professional indemnity and public liability, fleet, motor traders and truck drivers, opening out to more niche areas, like taxi cover. Open GI has helped us set that up as a new product, and bring it to market really quickly.

Shaun continues: "From a PAS perspective (Policy Administration System) we've been able to create seamless processes that take customers from sales to admin to renewal and/or claim, without having to rekey information like address or vehicle details. It also automatically generates all the policy documents and correspondence along the way."

Phil says: "That automation of everyday services means our teams are freed up to have more meaningful interactions with customers, looking at niche cover, cross-selling policies and ultimately getting our customers the right policy for the right price.

"I know it's a cliché, but we really are working smarter not harder - and that means we can process more customers, develop more products, and ultimately write more business."

Reports

NBe are finding the data provided by Open GI particularly useful, allowing them to take a more strategic view of the business. Shaun explains: "One of the great things about the Core Cloud system is the reports we're able to generate and the management information they provide. As we gather more and more data year-on-year, it's improving what we do and how we do it."

"We can split data by case, by product, and by advisor," adds Phil. "We can forecast with more accuracy and be proactive in what we target and when. That alone has been a game-changer.

"We're currently working with Open GI so some of that dashboard data can flash up on screens in our call centre, so we can see when we've won a case, celebrate sales and renewals, and create a really dynamic environment that encourages great customer service across the team."

People-first

NBe prides itself on being customer-centred and putting people first every step of the way. "At the end of the day, insurance isn't interesting, but people are," continues Phil. "We think getting to know our customers, dealing with them on a human level and building real relationships adds real value – and it's why our renewal rates are so strong, and how we've grown so fast."

"The value we place on relationships trickles through to how we like to deal with our suppliers, too," says Shaun. "We've got great connections with the Open GI team - particularly our Account Manager and Solutions Manager on the development side. It feels like they've really taken the time to get to know us, to get to know our business, and that they're as invested in our future as we are."

"They don't just do what they're told, or just wait to solve problems as they arise," says Phil. "They actually bring us ideas that would benefit us and actively come up with clever solutions to do things we'd never even thought of."

Partnership

Shaun says: "What we've learned is that having the right technology partner to support your ideas, your ethos and your vision is absolutely critical. With Open GI we've definitely got a partner and not just a provider.

"For us, that partnership has meant we're not just a little fish in a little pond. Open GI have given us the means to swim with the big boys – and now we're even winning customers off them."

"We're looking forward to a very bright future for NBe," concludes Phil, "and Open GI are going to be integral to that. There's so much we want to do – from self-service options through Open GI's portals to their AI chatbot, and other enrichment services.

"We've continually found Open GI to be friendly, efficient, reliable, and collaborative. If you're looking for great tech and dedicated support – or just to buy into someone that's actually going to buy into you back – you really can't go too far wrong."

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