Agents Empowered with Mobile Applications

CM WebClient and Sencha Touch Make it Easy for United Heritage Life Insurance to Create Mobile Applications from IBM i Applications

Beginning in 1934 as Grange Mutual Life Company, United Heritage Life Insurance Company has continuously provided life insurance and related types of insurance including pre-need and final expense insurance. United Heritage Life Insurance Company is now part of United Heritage Financial Group, which is the parent company of other insurers offering property and casualty insurance, giving customers a one-stop solution center for their insurance needs. Operating in 39 states, 1,258 United Heritage Life agents provide premiere insurance products to their customers. With assets of $511 MM and premiums of $70 MM, the life insurance company's strong financials provide assurance to their customers.

The Challenge

With a fixed development staff and no plans to add people, Roger Griffith, Manager, Life Software Development, was concerned about how his team would be able to create mobile applications from their existing application code base. The developers used CA Plex successfully to speed application development and enhancement; it was rare for them to write anything at the source code level. Insurance agents were asking for the ability to take the business applications into the field, so they could enroll clients on the spot, dynamically pricing the offering and tailoring it to the customer's requirements. As one of the premiere providers of life insurance instruments, United Heritage Life knew they couldn't afford to fall behind the 'mobile curve.' And yet, they needed a solution that would be "better, faster and cheaper," and not require them to write new code from scratch.

The Solution

United Heritage Life already owned CA Plex and CM WebClient. Other companies in the group had gotten benefit from CM WebClient in creating browser-based applications. Two years ago, Griffith and another team member had a chance to attend a workshop on CM WebClient and mobile in Chicago. Adding the Sencha Touch JavaScript UI library allowed CM WebClient to produce easy-to-navigate mobile applications from existing CA Plex applications. "Once we saw the solution and played with it, we knew that this was what our

company needed. We were one of the first clients to get on board with the mobile solution.

"We wanted control over the look and feel of the mobile pages. Most tools didn't offer that. CM WebClient with Sencha Touch allowed us to do all the development with my in-house, CA Plex development team. We didn't need to hire additional mobile UI or device development experts."

United Heritage Life also appreciated that the solution insulated them from the complexity of supporting the different operating systems and devices mobile requires. CM WebClient enabled them to build very robust mobile applications without writing a lot of new code. That made it a lot simpler for the developers to learn and start using immediately. The solution also runs well on UH's existing enterprise architecture, based on IBMi (AS/400).

"It's easy not to appreciate how good CM WebClient with Sencha Touch is because we never had to write a mobile application from scratch. It does all the work for you," Griffith said.

The Results

The first application selected for mobile enablement was their pre-need calculator which provides agents the ability to input customer requirements and select a plan that helps them pay for funeral expenses. The application itself was very straightforward, but as it represented almost 90% of United Heritage Life's revenue, getting it on mobile devices was critical. Working with CM First, they built the calculator and have been running it in production for 10 months.

United Heritage Life designed this application in a savvy way. Agents only have to download and install the native app once from Apple iTunes and Google Play. After that, they authenticate into the IBMi; their customized profile gives them access to only the apps they are authorized to use. In addition, the first menu screen was designed with an eye to adding new applications easily. The second application, final expense, is now integrated into the mobile system.

Based on the success of United Heritage Life, other companies within the holding company are now looking at CM WebClient and Sencha Touch to offer mobile applications for their lines of business.

Griffith feels strongly about the value of the combined solution. "I can't imagine anyone out there who doesn't have a need for mobile applications, especially for their external customers. If they are using CA Plex, they need this. You can take your CA Plex skills and build mobile applications very, very quickly. There's no decision here; you'll love it."

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