



From the [ORBIT Blog](#) , posted Feb 27, 2014

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Need Real Time Now?

Join our lobby campaign and help us advance the implementation of Real Time workflows

Brokerage principals, how long since you sat with a front line service or sales person as they complete a new business “estimate” with the customer waiting patiently (?) on the phone; then watched the steps involved when the patient client says “I’d like that policy” with the end result of a “binder” with the policy being issued and downloaded to the BMS a day (or week?) later at perhaps a higher price?

What did you think of that process?

Brokerage principals, how long since you sat with a keen commercial lines broker as they completed a new business quote on a small commercial property risk? Did they write down all the information while on the phone with the prospect, hang up the phone and then enter it into several different portals? Or did they decide on one carrier and enter the information into just that one portal? Or did they send an email to several underwriters and tell the prospect they’d get back to them in a few days with a price?

What did you think of that process?

Brokerage principals, how long since you sat with an accounting clerk as they handled the many emails for either a cheque to send to a carrier for a down payment on new business, or a cheque to replace an NSF, or an urgent cheque needed **today** to stop the cancellation of a policy? Your receptionist already issued a receipt to that client and let the CSR know the payment was made, who sent another email to whomever to request a cheque. Oh and don’t forget the receptionist/accounting did the deposit the cheque to be done. And then the cheque gets printed and signed and put in the courier and so on and so on...

What do you think of that process?

I am hoping you don’t like a single one! They are inefficient, ineffective, antiquated and do not deliver value to our customers. Are you asking yourself “but what can I do about it”? I hope so.

Are you aware that ORBIT working groups have already developed and vetted Best Practice Workflows to make each of these scenarios as efficient as possible? Are you aware that not a single carrier has committed to build their technology towards these Best Practice Workflows?



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Join our Real Time Lobby and let your voice be heard

Thanks to the great minds of a couple of brokerage principals, ORBIT has developed a **Real Time Lobby** initiative that will make it **easy** for you tell your carriers and vendors that you want them to move towards Real Time; that you support the Best Practice Workflows and want them to commit to changing their systems so that brokers have one way of doing things for all carriers.

Carriers have competing priorities. If brokers don't tell them what is important and what they need, other priorities will rise to the top. The **Real Time Lobby** will tell carriers Real Time is a priority for you and that you need them to respond.

It's easy: If you are an ORBIT member, go to www.orbitcanada.ca and visit the [Workflow Lobby Centre](#) in the Members section (your member id and password will be required). Not currently a member of **ORBIT**? Send us an email at info@orbitcanada.ca and we will get right back with all the information you need.

Ask all of your colleagues and peers to do the same. The squeaky wheel gets the oil. Brokers, it is time to get squeaky!!