



## Our Expertise & Capabilities

Today's business-technology environment requires an intricate, robust ecosystem - made of trillions of bytes of data, working together with several different technology platforms to revolutionize the way stakeholders transform their industry verticals. Many of these vertical industries face intense challenges in 2014 and beyond, and will have no choice but to change their established business models.

**Vertical Technology Solutions (VTS)** is a technology strategy firm with a solid record of partnering with companies and educational institutions; to deliver the tools needed for creative problem-solving, to be more efficient and effective, to be more involved, and to stay better connected. We excel at big picture and project deliverables, whether for fixed-term or negotiated engagements.

It all begins with a strategy, proper assessment and planning. **VTS** can help integrate existing systems, conduct gap analysis, or build, configure and implement new capacities (including 3<sup>rd</sup> party applications) that enhance technology systems and promote cohesive, seamless, functionality through: Data Integration, Infrastructure, Reporting, Web Development, Security, vendor management and overall Solution Implementation!

## What Sets Us Apart

Partnering is a core competency of **VTS**. We pride ourselves on providing clients just-in-time access to the horsepower of a full staff of competent technology professionals without the costly salary associated with such talent. Our professionals deliver right-sized solutions to small and medium sized businesses, and K-12 independent schools using Strategic Implementation services tailored to the nuances of your vertical industry (insurance, education, etc.).

## Leadership Team

**VTS'** professionals have over 50 years of combined experience and have led successful strategic technology deployments in the property and casualty insurance sectors, as well as K-12 independent school space.

We seek to leverage our experience in solving the business problems that are most common to your business, without a cookie-cutter approach. We take a holistic approach to identifying and understanding your business problem first. This results in a comprehensive technology plan that supports your business strategy, and increases your odds for success.

### **Robert Golden, Managing Director & Solutions Architect**

Robert has a proven and well-documented track record of assembling talented teams capable of transforming company and school operations. With many years as a corporate Chief Information Officer (CIO) he excels as a technical strategist with strong program and project management skills to align 'tactical deliverables' with 'big picture' business strategy.

### **Boon Lau, Principal & Solutions Architect**

Boon is a seasoned, results-driven IT Professional who balances a keen eye for detail with extensive IT subject matter expertise derived from hands-on and managerial experience in multiple industries including the Property/Casualty Insurance and Education Management industries. Boon is equally adept at translating business requirements into systems specifications by applying business analysis methodologies.

## Case Study #1

### Award-Winning Business Intelligence Project- Regional Insurance Carrier

**The Problem** - Over the span of nearly 30 years of operation, a regional insurance carrier has accumulated terabytes of data in disparate systems for applications, claim files, payment history, commission records, quotes and policy endorsements or amendments; but this data is not useful as information to key leaders that can help drive business decisions.

**The Approach** - After identifying all the various data sources, implement an information architecture that uses canonical data model at its core to loosely couple the multiple disparate data sources. This approach preserved the integrity of the source data while enabling it to be accessed in a centralized manner based upon a common nomenclature.

#### **Implemented Solution(s):**

- Implemented a Services Oriented Architecture (SOA) that modernized the potential of accessing data from older legacy systems of differing platforms such as IBM (DB2), WINDOWS (Intel), and etc.
- Procured and implemented an industry-specific, tried and true data model to which all source data was mapped. Included in the implementation of this model was a robust data presentation tool and reporting module that provided 'non-developer' access to data by business people.
- Architected an Operational Data Store (ODS) to house data model, incremental data changes from the initial load and business intelligence reporting tools.

#### **Results:**

- Transformed decision-making at every level of the organization from customer service representative who now has real-time access to critical information for all customer interactions, to executives who could now make useful comparisons of products lines, the cost of their operations. This enabled timely, surgical maneuvers to establish the right business mix in day-to-day operations and the annual budgeting process.
- Created Key Performance Indicator (KPI) information and trending that triggered pre-established actions based upon established threshold for loses, earned versus written premium, payment activity and commission (cost of acquisition) down to policy level granularity.
- Was awarded the **2008 Model Carrier Award** in the infrastructure category for Enterprise Data Model and Warehouse. Internally, the company experienced immediate benefit after dropping production time for internal reports and product design analytics from one month (after month-end close) to essentially real-time. This enabled the company to compete much more intelligently and aggressively in the market place

## Case Study #2

### Successful VOIP Implementation Leads To Expense Reduction- Managing General Agencies

**The Problem** - Regional company operates in a tri-state region with separate branch offices that support a distribution network of hundreds independent retailers. The cost of telecommunications between these locations was a fixed expense that was adversely impacting the company's expense ratio.

**The Approach** - Review the feasibility and implemented an IP (Internet Protocol) Telephony project that leveraged the company's existing data network between offices to enable voice communication and minimize or reduce telecommunications speed between branch offices.

**Implemented Solution(s):**

- Fortified the existing data network by upgrading to a fully redundant Layer 3 switches fed by fiber-optic connections.
- Source and procured a VOIP (Voice Over Internet Protocol) phone system that leveraged the newly fortified network to deliver voice and video to a phone device plugged into standard computer jack by an already existent data resource within the IT team.
- Analyzed call routing, hunt groups, voicemail and service messaging queues in existing analog system and optimized them in the new VIOP solution.

**Results:**

- Transformed annual telecom spend from a fixed number representing a large percentage of the IT budget to zero after the capitalized expenditure was paid off over three years.
- Improved the efficiency of call handling and routing between offices and re-purposed one full FTE (approximately \$45k annually plus 35% benefit load) who previously dedicated 100% to the receptionist job.
- Enabled the self-servicing of customer accounts through use of a voice activated response system. These allowed customers access to account information 24/7 and to make payments online. This resulted in the re-purposing of multiple customer service representatives (annual cost of \$45-70k plus 35% benefit load) to higher and more valuable customer operations.

## Case Study #3

### Strategic Technology Program Overhaul & Rescue - Prestigious Independent Private School

**The Problem** - Upon review and assessment, it was determined that one of the nation's largest independent private schools needed a technology overhaul of Infrastructure, Website and Student Information System (SIS) to support the school's strategic plan. **VTS** was engaged (mid-stream) on this program to rescue it from a 6-month miss on the 1<sup>st</sup> major deliverable, and protect the investment of program stakeholders.

**The Approach** - Address The School's aging technology ecosystems. Baseline assessments identified that existing systems: did not easily facilitate information sharing, lacked governance structure, showed unclear ownership and relied heavily on individual ingenuity vs. standard processes. Additionally, there was a limited understanding of current system capability, and the systems did not facilitate collaboration and knowledge sharing which limited the school's ability to achieve regulatory compliance.

#### **Implemented Solution(s):**

- Using program and project management methodologies, **VTS** took the helm of a failing projects that were managed separately and implemented a project management framework. 6 months off target, and missed its first major deliverable amid project staff changes.
- Implemented a project charter after identifying and interviewing project stakeholders. The charter defined scope, deliverables, budget, deliverable owners, and projected needed staff to bring the multiple deliverables on time.
- Established a vendor management protocol that renewed a broken trust that left vendors feeling uncertain of who the deliverable owners were.
- Identified over 200 open-issues and decisions that had to be address in order to take the project live.

#### **Results:**

- Despite coming into the project in January after a 6-month schedule slip and a missed 1<sup>st</sup> deliverable to the entire school constituency, took the entire solution (8 separate projects and sub-deliverables with data conversions) live on schedule for the start of school in August **2013**.
- Implemented an industry leading Web Solution for independent schools after stopping to upgrade the solution to account for previously unaccounted for faculty, student and parent requirements.
- Implemented an industry leading Student Information System (SIS) for independent schools clarifying requirements and closing over 200 open items, questions and decisions.
- Successfully collaborated with vendors to convert and validate data from the legacy SIS for thousands of faculty, parent, student & staff constituents.
- Successfully supported training and coordinated vendors in support of all school constituents (Students, Parents, Faculty & Staff) in order to open school on schedule.
- Learned and successfully maintained support for existing legacy web solutions and SIS while implementing the new technology to support The Schools strategic plan.

## Testimonials

**Independent School Administrative Faculty & Staff-** *"VTS Solutions architects displayed the highest levels of competence and professionalism throughout their entire tenure at The School. From managing a huge project that touched every aspect of the school, to creating solutions that demonstrated a technical depth of knowledge unparalleled in most IT departments, VTS performed with ease."*

**Independent School Math Teacher and SIS Faculty Lead-** *"I appreciated Robert's clear delineation of the big picture and ability to put the details in their proper place, while focusing on the important tasks at hand. I appreciated Boon's ability to see the technical side of things and delve as deep as needed to find solutions. I appreciated Paulynn's trouble-shooting and attention to the details needed to solve a variety of user and technical problems as we implemented the new website and SIS."*

**Executive Vice-President, Regional Insurance Carrier & Agency-** *"As an advisor to our executive management team, Robert was in charge of our strategic vision for technology advancement. Robert has the ability to speak to the most experienced technology experts in the field yet be able to explain the same processes to people that are not necessarily technology savvy. During his engagement, we successfully implemented several projects:*

*We implemented **Voice Over Internet Protocol (VOIP)** and a new phone system. Our organization had several branches along the east coast and the cost of communicating among the branches was challenging and expensive. The implementation of VOIP not only saved us money but also allowed us to communicate more and thereby improve efficiencies among all the branches.*

*We implemented **Imaging and workflow** solutions, as well as the supporting storage and back-up hardware. This included connections between offices to move our paper-driven insurance operation to faster, more efficient processes and near paperless environment.*

*We also completed phase one of a **Data Management** strategy that mapped data from 2 legacy systems to an XML model in an operational data store. This provided us with the ability to mine our data and respond more accurately to pricing and product enhancement.*

*The team's forward thinking strategic vision, and ability to execute will have a footprint in our organization years after their departure."*

## News & Recognition

**Westminster Magazine, Spring 2013**

[http://www.vtsinc.us/images/pdf/wms\\_magazine.pdf](http://www.vtsinc.us/images/pdf/wms_magazine.pdf)

**Computer World Honors Program: Killing a Failed Project**

<http://www.cwhonors.org/viewCaseStudy2008.asp?NominationID=1544>

**Computer World: Rethinking IT Budgets**

[http://www.computerworld.com/s/article/279569/Rethinking\\_IT\\_Budgets](http://www.computerworld.com/s/article/279569/Rethinking_IT_Budgets)

**PR Web: Skyware Software Salutes**

<http://www.prweb.com/releases/2008/03/prweb762174.htm>