



PegaWorld*iN*spire

JUNE 9-11, 2024 | LAS VEGAS





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An Everyday App To Grow The Sales Agent Business For Great Eastern Life

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Great
Eastern

A member of the OCBC Group

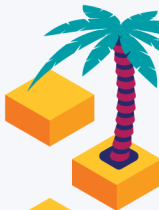
Reach
for Great



Who We Are



- Founded in **1908**, Great Eastern is a well-established market leader and trusted brand in Singapore and Malaysia.
- With over **S\$100 billion** in assets and more than **16 million policyholders**, including **13 million from government schemes**, it provides insurance solutions to customers through three successful distribution channels – a tied agency force, bancassurance, and financial advisory firm Great Eastern Financial Advisers.
- The Group also operates in Indonesia and Brunei.



Pega In Great Eastern



2013

- Pega CS & SFA (6.5)
- 3 Applications



2014-
2018

- Enhancements on existing application



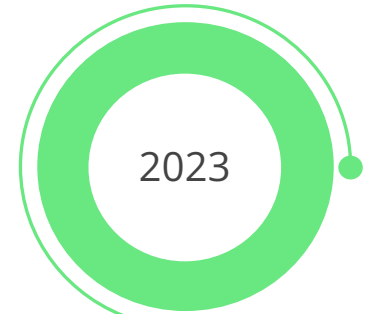
2019-
2021

- Support Great Eastern's digital journey through services exposed to other applications



2022

- Upgraded to V8.8
- Pega on our private Cloud
- E-Claims for Malaysia



2023

- Great Planner for Singapore
- CS expansion to Malaysia and Indonesia
- 10 applications are running on Pega platform



Change Is Constant..

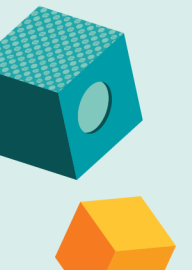


Singapore





We Listened.. To Our Distribution Channels

- Confusion with too many applications and systems .
 - Fatigue from logging into multiple systems
 - New agents overwhelmed with sales training, as such neglected on system training
 - Too many messages everywhere, lost track on campaigns
 - Paper submission for some requests, hard to follow up
- 

We Needed To..

- Update our technology stack and user journey.
- Rationalize, consolidate and eliminate overlapping features.
- Transformation of distribution channels and build healthy habits , the **“Great Eastern Way”**

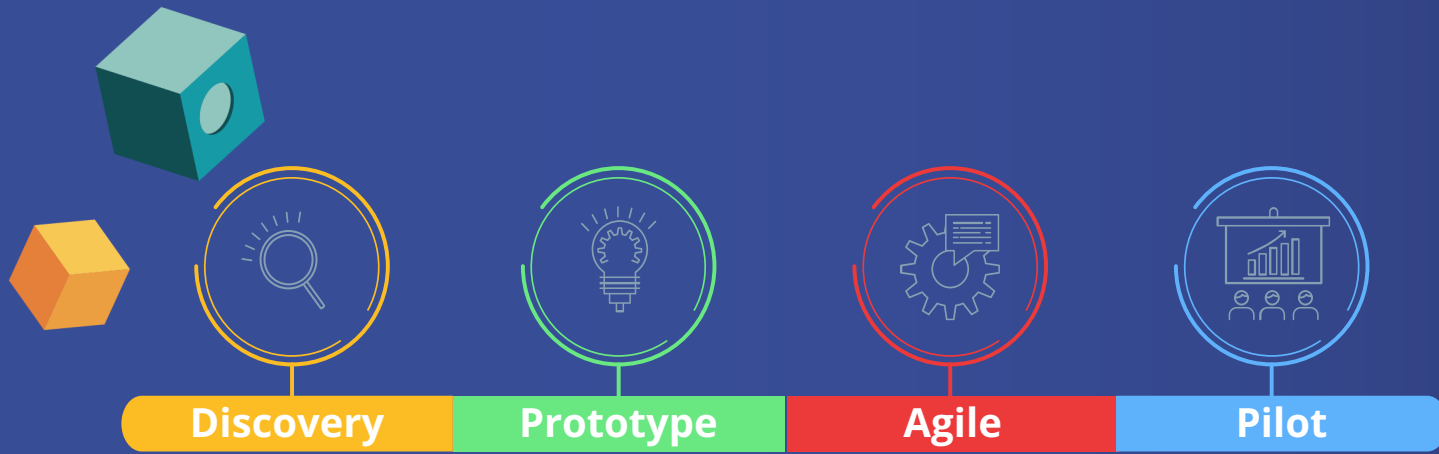
Re-Imagine ,Re-Define , Re-Purpose

- Redefine user experience and simplify agent journeys – “An Everyday App”
- Consolidate features leading to cost avoidance on multiple platforms and trainings
- Increase sales productivity of agents
- Increase revenue



Our GREAT Journey





Focus Groups

- Use of design thinking; targeted focus groups with Agents and use of UI design systems
- Focus on "Jobs to be done"

Validate

- Reconfirm our selection of Pega
- Identified HCL Singapore as the development partner.
- Prototype with Pega Mobile

Methodology

- Show and tell to ensure alignment and remediate quickly
- Architecture blue print

Change

- Pilot with early adopters ; feedback prior to full launch
- Usage analytics to guide next course of action

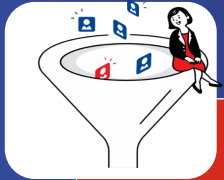
GreatPlanner– Building Successful Habits



Plan
Daily
Priorities



Pacing
Performance
To Success



Maximising
Opportunities



Know Your
Customers

What We Have Achieved So Far

- 180 rich features
- 70% adoption within 1st month of launch ~ half the time compared to other apps
- 86% active usage
- 27% usage increase from the previous version

Plan Your Daily Priorities

Single view on priorities, tasks & appointments for the day- **reach for GREAT every day!**

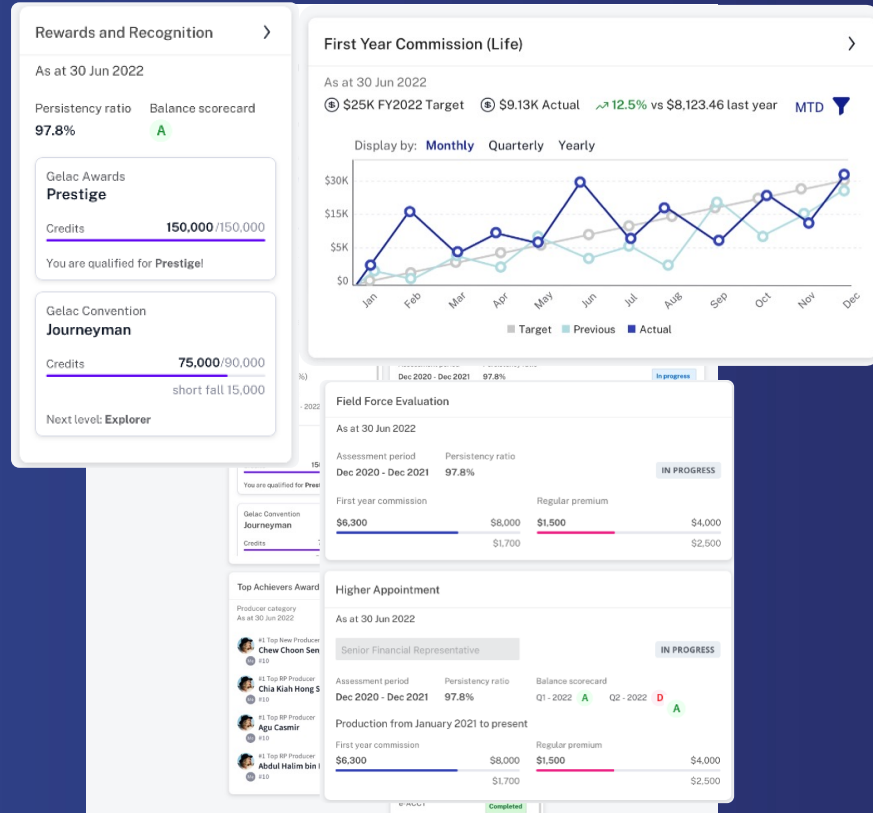
The screenshot displays a calendar application interface. At the top, there is a dark blue header with a user profile icon, home, calendar, notifications, and search icons. Below the header, the word "Calendar" is displayed, followed by a "New appointment" button. The main area shows a monthly view for October 2022, with tabs for "Personal" and "Corporate". The calendar grid shows dates from 25th to 29th. Appointments are listed for several days, including "Jcube Roadshow", "Share GPP", "Coffee with Mich...", "Go through GWA", "Underwriter Reser...", "Go through GLA", and "Servicing claims...". A "Deepavali" event is shown on the 24th. On the right side, there is a "Categories" panel with a list of categories and checkboxes for selection.

SUN	MON	TUE	WED	THU	FRI	SAT
25	26	27	28	29	30	1
2	3 Jcube Roadshow	4 Jcube Roadshow Share GPP	5 Jcube Roadshow Coffee with Mich... GCP sharing with...	6 Jcube Roadshow Go through GWA	7 Jcube Roadshow Underwriter Reser... Servicing claims...	8 Jcube Roadshow Go through GLA
9 Jcube Roadshow	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24 Deepavali	25	26	27	28	29

- Select all
- Sales prospecting
- Servicing
- Personal
- Prospecting activities
- Underwriting reservation
- Key distribution events
- Recruitment
- Recruitment events
- Campaign

Pacing Performance

Tracking performance to
pace against goals!



Maximizing Opportunities

Timely follow-up on lead opportunity and **maximise every campaign!**

The screenshot displays a CRM interface with a customer profile for Johnathan Chua. The profile includes contact information: Mobile number (9988 7766), Email address (johnathan@gmail.com), and Address (321 Street). A 'Status update' modal is open, showing a dropdown menu with 'Prospecting' selected. Below the dropdown, there are four status options: 'Prospecting' (checked), 'With sale', 'Not interested', and 'Uncontactable'. A hand icon points to the 'With sale' option. The background shows a list of customers with columns for Name, Status, and Priority.

Name	Status	Priority
Tan Kin Jie	Prospecting	1
Derrick Lim	Prospecting	2
Johnathan Chua	Prospecting	3
Andrew Wong	Prospecting	1
Benedict Lee	Prospecting	2
Cheryl Chew	Prospecting	3

Know Your Customers

360 view of each customer to engage, monitor and follow up, **never miss out on any single opportunity to stay close to the customer!**

The screenshot displays a customer profile for Grace Lee Been Yan. The profile is divided into several sections: Personal details, Contact information, and Profession. Below the profile, there are two panels: Targeted campaigns (2) and Engagement opportunities (3).

Personal details

Fullname:	Grace Lee Bee Yan
Birth date:	22/01/1980
Age:	41
Race:	Chinese
Nationality:	Singaporean
Marital status:	Married
Lifestage:	Planning for retirement
Family status:	Married with kid
Preferred language:	English, Mandarin, Hokkien

Contact information

Mobile:	65 9876 5432
Email:	gracelee@email.com
Residential address:	2 Tanjong Katong, #13-02 Pava Lenar Quarter, Tower 3, 437161
Consent status:	Call, Email

More details

Smoker:	No
Height:	170cm
Weight:	56kg
Join date:	08/11/2006
Last interaction date:	6 month ago, 08/11/2021
Next review date:	Next month, 08/11/2022

Profession

Occupation:	Market researcher
Annual income:	\$45,000-90,000
Highest qualification:	Master
Employment status:	Employed
Company:	Grab
Industry:	IT

[Show more](#)

Targeted campaigns (2)

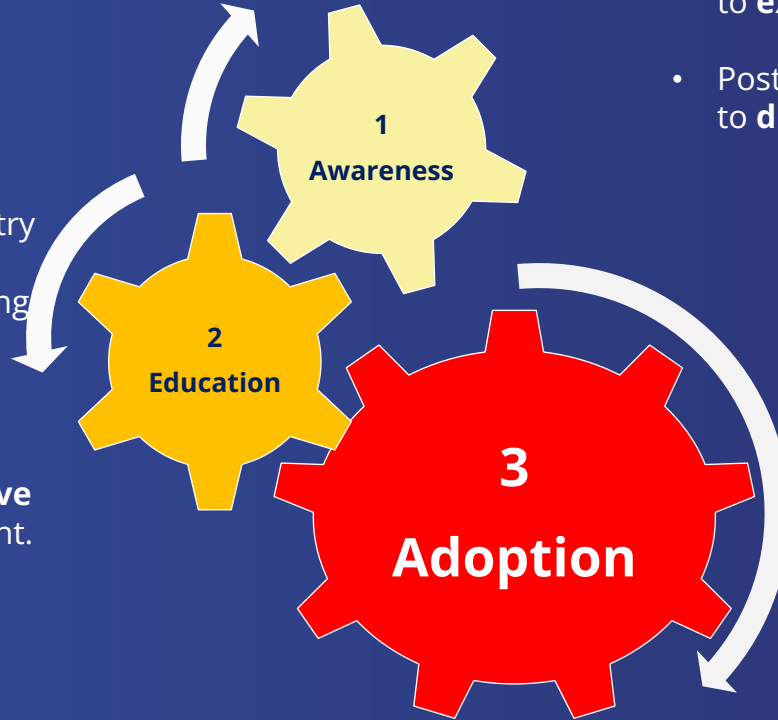
- Great Cancer Guard 2022
1 Nov 2022 - 30 Nov 2022
[Email](#) [WhatsApp](#)
- Great Bundle of Joy 2022 January - December
1 Jan 2022 - 31 Dec 2022
[Prospecting](#)

Engagement opportunities (3)

- Birthday
1 Oct 2022 - 31 Oct 2022
[Send greetings](#)
- Maturity Rollover (MRO)
1 Oct 2022 - 31 Dec 2022
[Email](#) [WhatsApp](#)
- Achievers 2022 pre-selection
1 Oct 2022 - 31 Dec 2022
[Pending](#)

Change Management

- **Hands-on experience** to try out new & key features. Friendly competition among participants.
- Address participants' questions and feedback promptly to **create positive peer learning** environment.



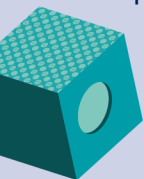

- Pre-launch communications to **excite the users**
- Post-launch communications to **drive momentum**
- **Jump start** successful sales habits with the app
- **2-way exchange** between Agents and Corporate

Our Technical Approach





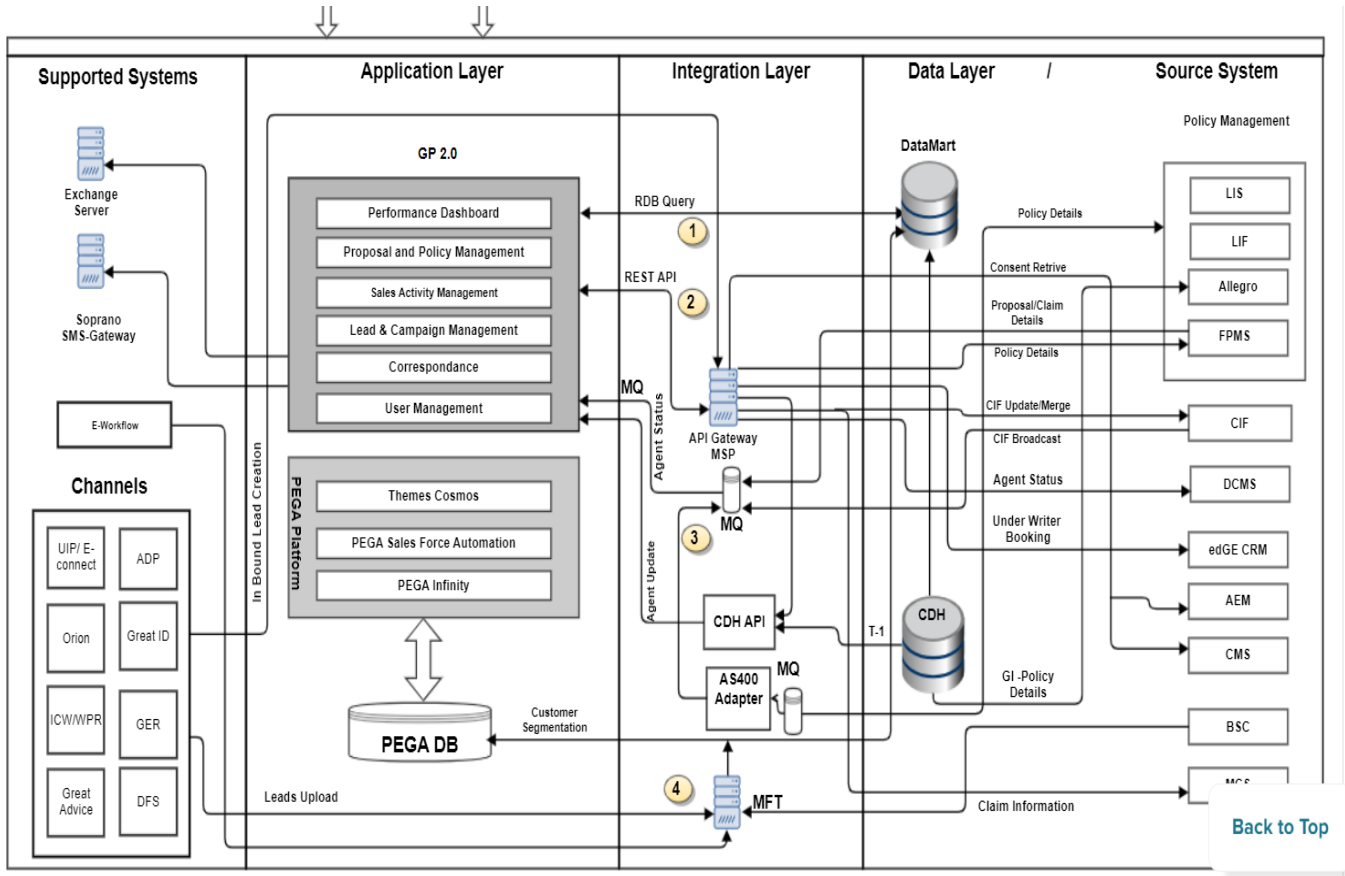
Technical Goals

- **Data Integrity & Availability** – Harmonizing data across 3 lines of business – Life , General and Group across 6 policy administration systems and agents compensation systems
 - **Data Security** including security of end point devices in a BYOD situation
 - **Scalability** – Full use of cloud architecture
 - **Accessibility** – Both via mobile app and on browser
 - **Maintainability & Modularity** – Avoid use of unnecessary customizations and decisions on components on enterprise layer vs application specific
- 
- 

Our Approach

- Clarity on real-time vs Batch and use of microservices, API and data pipelines.
- 3-way collaboration between Pega mobile engineering team, Blue Cedar and Blackberry dynamics
- Leverage our own private cloud structure containers to support large scale API consumption based on demand. Observability.
- Pega out of box capability and use of certificate issuance through Blackberry UEM that complied to the 2FA requirement, yet provided a seamless access to the application through app or browser
- Regular design consideration sessions to decide on implementation approach. Feedback and redesign of UX to avoid extensive customizations.

Our Architecture



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Our Next Steps

- Exploring move to Pega cloud to avoid the constant need to upgrade.
- Use of Gen AI capabilities to provide a “Knowledge Buddy” to the distribution channels.
- Exploring personalization to shift the campaigning capabilities.
- Continue to consolidate features from other systems to make GreatPlanner the unified Go-to app for agents.



Celebrating Our Recent Win - SBR National Business Award (Digitalisation, Life Insurance)



Make it happen with GreatPlanner

Hear from our financial representatives



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