

# Jenesis Software - Podcast Episode 4

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Eddie: Welcome to another episode of our podcast. I'm Eddie. Today, I want to start by mentioning that if you are watching this on a video, now if you're listening to this as a podcast, you're probably good. You know how to make podcasts work for you. If you're watching this as a video, it's also recorded as a podcast and if you are not a podcast listener, I encourage you to do a little research and figure that out. There's some great things you can learn there. For instance, if you are an iPhone user or an Android, you can get podcasts right to your phone, listen to them when you're going down the road any time. To start, go to our website, [jenesissoftware.com](http://jenesissoftware.com) and at the top, there's an option for podcast. Click on that and there'll be instructions there to show you how to download the podcast to your PC, the different episodes or to your phone. It's a good way to get started by going there.

Today, we are going to be talking about our newest genesis product called Jenesis Now. Jenesis Now is the web version of Jenesis. The Jenesis Windows version has been around seventeen or eighteen years. This is the future of Jenesis. This is a web version. We still have the Windows version and that will be around as long as needed, and it's continued to be supported and developed and enhancement's done there as well, but this is going to be, we believe the future of our company and of all agencies, using web products.

What I've done is in this podcast, I have a few guests with me. I have Lisa, who's the vice-president of Jenesis software in operations. She's very involved in software projects, larger projects at Jenesis, and also have Tim and Michael with us who are the developers of Jenesis Now. Welcome guys.

Lisa: Thank you.

Tim: Thank you.

Michael: Thank you.

Eddie: I've got these three guys with us and what we're going to do is let everybody bring you up to speed on where we are with what's going on with Jenesis Now. Jenesis Now, if you think about an agency management system as a whole, I think there's this core functionality that agency management systems are going to have and then there's these bells and whistles maybe that make one stand out from others. The core functionality, the core features are things like the

ability to support personal lines, the ability to support commercial lines, and to me that includes downloads and everything for that particular line of business. Then there's all these bells and whistles, integrations with credit card processing companies, integrations with electronic signature or even built-in electronic signature, functionality. Those are the little extra things.

Jenesis Now, at the stage where we are right now, has personal lines pretty wrapped up where currently you can use Jenesis Now in your agency if really all you're doing is personal lines. It's downloading, it's receipt functionality, it's got notes and imaging and all those things. Commercial lines is the thing that's coming next. Along with that is the things like the bells and whistles, the integrations with electronic signatures and so on. We believe that those things are coming in the latter part of this year, 2015, and throughout 2016. That sort of lets you know where you are, of not letting my guests speak at all, but do any of the three of you have anything to add with what I just said about where we are right now and the big picture of where we're going in the coming months with this version.

Tim: No. For once, I will not say anything.

Eddie: That's sort of where we are, I just want to lay that out a little bit. Now, I want to take a few minutes and really let these guys talk, especially Michael and Tim because in this version, partly because it's a web product I think, but partly because these are things that we should be paying attention to and that we want to be fanatical about. We don't want to just be status quo, we want to be phenomenal and fanatical about these things. It's around the topics of security, speed of the system, mobility, what all that means and what we're doing about that, stability and flexibility. We've got everything but nobility built into this. Michael or Tim, would you guys take a few minutes and talk about each one of these things and what we're doing and why it's important ... You can talk a little detail, a little technical but don't be here for an hour boring people to sleep.

Michael: I'd like to start by talking about reverse index to b-trees and how those save milliseconds off of every single query. I don't actually know anything about reverse index b-trees. I was hoping Tim would save me.

Tim: I'm letting you bury yourself with this one.

Michael: Thank you Tim. To talk about the points that you raised there, there are five or six areas that Tim and I have been working on for the past several months, revisiting and reevaluating how we deal with things like security. Actually, I'm going to touch on flexibility first. We talk about flexibility from a geek standpoint, we're talking about rearranging and restructuring how we store the data. That's our b-tree index there. How we store data in our database has a pretty big

impact on the speed and security and overall flexibility of a system. Based on some of the feedback from current users and based on some of the plans where we'd want to go and features that we want to support, we've had to reimagine or rethink how do we store data and how that's represented to end users.

That sounds all dry but as we restructure this data, that gives us the ability to give people more flexibility. We have the support of very granular data permissions at different locations. That's probably one big new way of thinking that people are going to see with Jenesis Now coming out as people come out over the next few months. Things like that's a security thing, we want to make sure that people can make sure that users in one location have the permission to do their job but not necessarily permission to see data that they shouldn't see.

Eddie: That's a good point. That's quite an enhancement from what the people that are using Jenesis Now have experienced for over years. I don't know that I've really heard that request much over the years but it's the coolest thing ever. I think that's going to be totally night and day for people, especially these agencies who have multiple locations. That's just one example, I know, which is a lot of that, but that's good stuff.

Lisa: Going back to flexibility, can you talk about what that might mean to the user? How might that translate to what they see with regards to changes and things like that?

Michael: Tim, take it away.

Tim: I'll take this one for a little bit. Every agency management system, I've been with the company two years now and one thing I've noticed is every agent [to 00:07:46] management system is different in a lot of ways, the same in the others. We have a lot of things that we hard-code because that's the way people run their business. We had bells and whistles and tweaks according to what our users want to run their agency. One of the things we've rethought about it with Jenesis Now is building in a lot of this ability for agencies to customize our product so that they can run their business the way they do it.

Even on the user level, users will be able to customize the way they want to run their business based on a user at the next [dest 00:08:25]. It's very flexible in that way. Like Eddie and Michael were just talking about, even down to permissions, at a very base level, users will be, actually agency owners will be able to have the ability to allow users certain abilities at different locations, all abilities, very little abilities, they'll be able to let their accountant on the system just to look at one specific type of reporting feature. There's a lot of flexibility we're building into this.

Michael: Agreed.

Lisa: It's at the policy level too, right?

Tim: There's ...

Michael: It is now.

Tim: I'll say yes.

Michael: Okay. Mark that down. There'll be some, I think what we showed to some of you a couple of months ago, there's going to be probably some visual changes in terms of letting people choose probably one of two or three different visual themes. Some of this is different colors, different font sizes, things that may make the system a bit easier for you to use, as opposed to a one size fits all. Another example of some of the flexibility we're talking about, the idea of addresses, a lot of systems will say you can have one address, you can have two addresses, probably most people don't have more than three or four addresses at any one time. Being able to say, "You can have as many addresses tied to a particular record as you want," is a byproduct of the data flexibility that we're talking about here.

Eddie: As many email addresses ...

Michael: As many phone numbers.

Lisa: And numbers. I think about that for phone numbers.

Michael: This might be something that doesn't change the day-to-day use for a lot of people but for some of the people that need or wanted to be able to store more than two things or more than three pieces of data will now have the flexibility to offer that to them.

Eddie: I think the whole notion today in discussing each of these five things that we're going to talk about right now and the first being flexibility, we're talking about a philosophy as much as anything. We're adopting this philosophy in the way we're building things to make it flexible, would that be accurate?

Michael: Yes.

Eddie: Anything else on flexibility.

Tim: Nope.

Eddie: All right, next.

Michael: We've actually touched a bit on security already which is really to some extent a byproduct of some of the flexibility and there's actually other aspects of ... We'll stay on this a little bit. Did you have something particular on the security aspect? We talked about permissioning ...

Tim: No. Security of permissions is where that comes in. That will be a vast change from the core Jenesis product that's out now. I'm not sure if anybody's doing this the way that we'll be doing it, allowing so much control.

Eddie: Control?

Tim: Control. That's exactly the word. Configuration. For it to be intuitive, very easy to do and that's another thing we're taking into account with this product is making it where training will be more of a secondary learning instead of having to do all this training before you can start using the product. You already know how an AMS works, so using this will be easy enough and then learning about some of the bells and whistles and extra functionality that you may not know is where the extra training will come in.

Lisa: When you talk about security from an agent standpoint and I'm the agency owner, am I going to be choosing roles and I don't know the answer to this, guys, so I'm kind of waiting to see what these folks say. Is it going to be more role-related or are you actually going to be choosing individual functionality ...

Michael: At a granular level.

Lisa: [To 00:12:26] users, yes.

Michael: The first pass of this is going to be just focusing on the granular level of permissions. In a future version if we end up grouping some of those back into role concepts, we may do that. I remember Eddie saying, even just recently that one of the issues with coming up with system-wide roles is when you get into dealing with dozens or hundreds of agencies, they all think of things somewhat differently. It's better to give people the granular permissions and flexibility they need first, learning from that how people are using things will give us a better idea of good defaults, maybe some default roles or just default permissions to give everybody based on the last fifty clients did this, this is a very good default. This is how everybody's using it.

Lisa: I'd probably like it if you could, if I was an agent, I would like it if you could allow me to choose the functionality I want and then create my own role that I could then use for the next user to add.

Michael: You would like that, wouldn't you?

Lisa: Yes I would.

Michael: That could be where we end up going with this, is the idea of user-defined roles and agency roles that belong to a specific agency. Tim and I have been going back and forth on this a lot, there's a definite balance between functionality and [usability 00:13:54] to understand ability. It's really a moving target more than anything else and a constant feedback and learning thing. What makes sense to people now for a lot of people didn't make sense to them five or ten years ago. After they've used something for a while, they just generally, the consumerization of Internet and web services has given people a different perspective on what they expect and how they want to work with things. That's changing all the time.

Lisa: Great.

Eddie: Okay. Anything else around security?

Michael: I'll talk a little bit about Tim and I, some of our experiences with<sup>3</sup> this, getting back to the expediency versus usability, security's in that mix someplace. We've been re-factoring some of the functionality both to allow for more of the flexibility but putting in more security. It actually takes time. There's a lot of things that you can do very quickly that you can get something done in a few minutes but it's not as secure as it could be. Just from a geek tech standpoint, we've been having to put some new tools in place and put to some new libraries and thinking in place about how we deal with people's data. Dealing with people's data in an access database or in a desktop-based system is inherently much, much different than it is in a network connected system.

I'll throw out the term multitenancy, we actually have two levels of multitenancy because we're going to have one system, one database holding all the agents' information but each agency should only see their own tenants or their set of data as well too. There's multiple levels of security going on, which it's not impossible to do but it's not as trivial as I'd like it to be.

Eddie: Definitely an ongoing battle.

Tim: It's a hot topic for sure, all around. I wouldn't bring it up today because I think people need to know that we are aware of it, that we are on top of it and that we are taking the measures that need to be taken so they don't have to be concerned and they can just come in and do their jobs.

Eddie: Was stability one of the next things?

Tim: Yes. Stability and mobility are our last two.

Michael: The notion of security and the processes that we've been adapting and adopting to deal with that and to deal with some of the flexibility leads into stability for all the [abilities 00:16:21] there. We're putting in some new testing suites and testing procedures and we're making sure that the refactoring that's going on is testable. Now we've got a suite of dozens and dozens of tests that we could run so that when a change is made, whether it's a security change or a visual change or a data change, we can make sure that there are no impacts.

This is not a checklist, we've got this done and we're set, this is a philosophical, this is the new way that we're doing stuff and going forward, every enhancement, every change, will be checked so that really helps us make sure that things stay secure. They may be secure today but if we introduce a bug tomorrow we'd like to know about it tonight rather than tomorrow. This changing of the underpinnings of how we're writing stuff is going to lead to stronger stability, stronger security and give us the support, and frankly give all the agents the confidence that this is working, it's working today, it's going to work tomorrow.

Eddie: That's huge. That's important. We moved on to stability, did that cover stability? Anything else, Tim, to add? [Questions ask 00:17:36]

Tim: That's pretty much what stability is. That's pretty much what stability's all about is making sure this runs exactly the way we think it's going to run and keeps running and the importance of that testing that Michael was referring to is, nothing will ever be bug-free. Once we find a bug and we fix it, we write a test around it that then the next time before we release something to the wild, we run these tests and they're all automatic and they run off the same data so then we know something we fixed over here on this screen doesn't screw up something we already had working which is something that all software developers have to deal with that.

Eddie: I've never experienced that ...

Lisa: I'm so glad you covered that because that's going to be my next question is how we cover that.

Tim: That's the biggest thing for me is the ability to run these tests automatically and not rely on us humans, developers and testers, to make sure we test everything, every single way, every single time. It's impossible to do, but that's why we program computers. We've got that to do that and we still won't be bug-free but we won't be making the same mistakes. That's the most important thing.

Eddie: We've talked about flexibility, security and stability. Let's talk about speed or mobility.

Tim: I think to a large extent those go hand and hand with ...

Eddie: They're all related.

Tim: Yeah. They're very much tied together. I think, certainly our primary focus in terms of UI or user interface and user experience will continue to be the desktop and the laptop primary user interface for at least the short-term foreseeable future. We are putting some libraries in place that will allow for certainly iPad and tablet usage to be more or less the same as the desktop experience, probably with a little bit of tweaking. At some point, supporting smartphones, either with native apps or very optimized versions of websites scaled for 3 and 4 and 5 inch devices is on the horizon.

Eddie: By the time we get there, those phones may be the size of tablets anyway.

Tim: Phablets I think is what you are referring to.

Michael: A little side note, we went to a concert a few weeks ago. My wife had an iPad Mini which is like a 7 inch tablet and we got refused. You can't come in with that, but a 6 and 1/2 inch iPhone 6 Plus, perfectly fine but that extra quarter inch or half inch, no, no. Can't let that in the stadium because I still don't quite know why but yes, that form factor range is certainly ever-changing.

Tim: The idea a while back was to get smaller, smaller, smaller. Now turning back a little bit ...

Michael: Some of the changes that we are implementing to support both mobile devices, really having an impact on speed as well in terms of moving a little bit more of some of the error checking and display logic into the client doing more client-side JavaScript. The goal there is to speed up some of the actions that used to require a lot more processing on the server. We can do a little bit more of that on the client and speed up a lot of the experience. In some sense, the actual processing may take a little bit longer with some of the security steps that we're double and triple checking, but the experience for people on the desktop should be as fast if not maybe faster than previous experience.

Tim: Part of that is instead of us doing everything on the server and then the screen coming to you, as the screen is coming to you, it gets you quicker and then your browser is doing some of that. It's the browser is multitasking. As it's writing through the screen it's figuring out some of these things that we didn't have to



figure out on the server. Writing that on the front-end versus the back-end will increase speed just because that's the way it's done.

Another thing with the mobility is the current version of Jenesis, the Jenesis Classic or whatever we're calling it now, the desktop version is a certain size screen. Every piece of data's in a certain place, and I think a year or two ago, you guys increased the size of the screen because monitors have increased over the time period. Now most people are using wide-screen monitors but there are some still using the 4 by 3 ratio. They're still using a better resolution. Jenesis Now, the current version that we've got out there, it's still a kind of fixed version based on what most people use on their monitors. We're working on a responsive version that will automatically move data around depending on whether or not you own a smartphone or a tablet or wide computer, you'll be able to do more along with the templating which doesn't really speak toward mobility, but the templating, you'll be able to ...

We've had this in the past, Michael may not know this, we've had some users who wanted more contrast on the screen. The templating will allow that flexibility for you to have that kind of contrasting and all this works together. We keep bleeding into the other areas while we're talking or at least I do.

Eddie: Sure. They're all related.

Tim: They know I do that, so ... They are all related. It's a lot of rethinking the way that we've thought in the past.

Eddie: Anything else? Did we cover speed well enough?

Tim: We have a paramount focus on these things so speed is one of those things that we are working hard to make sure we deliver an experience with the customer just blown away and they're not clicking and waiting ...

Lisa: That's what I wanted to speak to about I had heard, but I've seen this, I think it's really cool. If I were to go just give them a general idea, if I were to go and look up a client in Jenesis Now with some of the things that you've done, how long would it take? Is it seconds, is it that kind of thing ...

Tim: Milliseconds. 3 or 4.

Lisa: Okay. That's important because I know if I'm hour, what I would call hourglassing. It probably doesn't even exist on the web.

Tim: It does not.

Lisa: If I were hourglassing and I have in certain different types of software or websites, then that's a problem. What you're talking about is as a user, if I know that I'm going to have something in front of me almost as I'm typing it in, that's a huge difference from what I might see in other systems even.

Michael: There's a lot of philosophy going on that we are forging and certainly one is we want a great user experience, speed is a great factor in that. Security has to go hand in hand with that. There are going to be times when we could cut a corner and say, "Hey, we can get this done and we can get this done in 50 milliseconds." The correct way is going to add another ten, twenty, fifty milliseconds. We have to balance out the speed with the security. They are sometimes very at odds with each other. That said, that's another reason why we're looking at pushing some of the user experience down to the client so that things can be faster and more responsive when they need to be and we're not having to hit the server as much. Tim actually just passed a note over. Would you like to read that for the full class, Tim?

Tim: We're redoing the way we do searches, which doesn't sound very interesting.

Michael: It's not, until you go to use it.

Lisa: I guess that's what I was talking about.

Tim: Yeah, it is.

Michael: Partially.

Lisa: I do like it.

Tim: Some of it, Ajax Enabled, and you've seen these on websites and YouTube implemented this way back, GooTube ... GooTube, Google, well it should be GooTube because they own them. Google implemented this way back, real time searching as you start typing in a word, your search [crosstalk 00:26:01] popping up. This will work that way. We have that at a small level in Jenesis Now at the moment but it's going to be on a much larger level.

Once you have your search items on screen, we've rethought the way that's going to happen and that will be almost instantaneous when you need to re-order and re-sort on screen. When we say instantaneous, we mean we will do it before you click the mouse.

Michael: Actually, I want to touch on one other thing that we're exploring right now. That's the idea of search, one level of search having, for the geeks, any geeks out there? Give me an amen. Looking at Lucene specifically as a back-end search

technology, if you have a geek in your family or at your company, go ask them about Lucene, they'll tell you about it.

Tim: Take [the Mountain Dew 00:26:52].

Michael: Yeah. The idea here is to have more of a search engine like search experience and part of that has to do with spelling mistakes. If you only know part of a client's name, or it's Smyth with a Y instead of Smith with an I, searching will still yield that result instead of having to find an exact match. That is something where the early stages of getting that integrated ... Again, I'm going to bring up the other philosophy about security, it would be great if the search was that fast but if you get back somebody else's clients, that's certainly not an experience that we want to give. We are continuing to balance the speed with keeping your data, your agency's data, and your client's data as secure and as private as possible.

Eddie: That's a cool feature too, that search like that because we've been proud for many years of Jenesis because it would do a partial name search. At the time, that was really cool and in the past, that was cool. You didn't have to type in Jackson, you can just type Ja or something and see who that results, gets back to you. This is the right way to go and it's awesome.

Michael: It gets back to what I was saying before about what people expected, five and ten, fifteen years ago, versus what they expect now.

Eddie: Are we going to have a pager field, a field for people to put their pager number ...

Michael: We could, we could, yes. We'll have a field for mobile phone, a field for smart phone, a field for brick phone. We'll have all three fields available for your client needs.

Eddie: Anything else about speed? There's five things that we covered, we covered those pretty well?

Michael: I think we did.

Tim: Yep.

Eddie: Browser recommendation for browser for these products or what?

Michael: Links, and Amaya are my two favorite. For the non-geeks, those are really geek products. I'm just translating, that's all. I lean toward Google Chrome personally, Firefox is also very good and mainly because those two browsers are the best

with keeping up with HTML 5 and the latest versions of HTML coming out of which there have been fixes and speed improvements and we can do some cool stuff in the background using HTML 5 and et cetera, that will make the user experience better. We like to keep up with them. I am vocal about being anti-Internet Explorer just because they don't keep up with what [inaudible 00:29:33] does ...

Eddie: That may be changing. I have no real horse in the race, I use all major browsers. It's interesting that you mentioned Chrome and Firefox. Anybody out there listening, watching, hello. If you use either Chrome or Firefox over the last, certainly the last couple of years, you've noticed that they basically automatically update. You may open up your browser and it'll say, "You're on version whatever" or something.

Which is something that certainly Safari and IE currently don't do. You have to go get new updates when they're available, you have to manually do that. I think certainly a lot of developers like both Firefox and Chrome simply because if you are testing or know that that is a supported browser, you know that 95% of the users using them will always have the current version. The idea of trying to say, "We need to support IE 7 or IE 8," It's just a lot harder to keep up with that. Certainly, I'm a big Firefox fan, I use Chrome, I use Safari, I do use IE but it's not my first browser choice.

Tim: One of the challenges seems to be that still, a lot of insurance companies have built their stuff where it's only really working on Internet Explorer. That makes our job a little more complicated.

Michael: I think certainly even up to a few years ago, depending on the size of the company or the enterprise using that, there definitely were benefits, there were security benefits, there were in-enterprise benefits to having IE as your main platform. In terms of smaller agencies and software as a service organizations, the benefits of IE are less pronounced, in some cases they're just not there at all. Like with Safari, not auto-updating, it actually is a hindrance in some cases because you can't get it back to security, you can't make sure that people have the latest version. They may be stuck on IE 9 or Safari 6.

Eddie: We do have a lot of Windows XP users still out there, businesses and so forth. They can't get above IE 8, am I correct?

Michael: I don't think so ...

Eddie: IE 8 has never seen the internet correctly. There's all kinds of code that does not run correctly on IE 8. These same users can download Firefox and Chrome and see the internet correctly.

Michael: More correctly, yeah.

Eddie: More correctly. We've seen a big push this year on new hardware purchases. I think your comment about XP, that has been an issue because for some people, it feels like they just got their XP machine. It's just three or four years ago to them. We're seeing more people, I don't know if it's the economy having some improvements or what's driving that ...

Michael: Some sales at Best Buy going on. Really good deals at Best Buy.

Eddie: 36 months, same as cash.

Michael: Yes.

Eddie: I really want to thank you guys for being here today. This has been extremely helpful. I'm sure that the listeners will enjoy all the technical information that you've got. If you have any questions for us, please let us know. My email address is eddie@jenesissoftware.com and I'll be glad to route anything to anyone, if you have any questions if I don't know the answer. I'll also mention again, if you are watching this in a video format and you would like to download the episode or other episodes, we have more Jenesis podcast episodes, there's lots of cool podcasts about all kind of things out there that you can learn, both insurance related and otherwise.

Go to jenesissoftware.com, click on the podcast menu item at the top, and it will tell you how to go about getting episodes like this onto your phone or onto your PC for your listening pleasure. I want to also mention, if you have interest in Jenesis Now or feedback or comments, or even if you just want to see, better understand where we are and see if you might be a candidate now to move over to Jenesis Now, when that might be. If you have questions around any of that stuff, talk to our salespeople. j Lisa, what is the contact information for Christy and Jon? Do you have that?

Lisa: Email addresses for Christy and Jon, Christy is christy@jenesissoftware.com. Jon is jon@jenesissoftware.com. You can reach them by phone at 828-245-1171. Jon is extension 104 and Christy is extension 115. Again, that number's 828-245-1171.

Eddie: Thank you. Any final comments, any closing comments from any of the three of you?

Michael: For once I will not say anything.

Tim: Nothing from me other than it's great to be here and I look forward to continuing to put out some new features and functionality for agents just like you.

Eddie: Cool, thank you. Wonderful.

Lisa: Enjoyed being here.

Eddie: All right.

Tim: Yes.

Eddie: Thanks again guys, and thanks so much to you folks for listening. We look forward to your feedback. Take care.