



2024

INTRODUCTION TO ZHIBAO CLOUD

Chengdu WeiSiFan Technology Co., Ltd.

Contributing to the High-Quality Development of the Insurance Industry

About Us

In November 2017, the company's core team began operations in Shenzhen. By August 2018, the company had established its headquarters in Chengdu, forming Chengdu Weisifan Technology Co., Ltd., with a focus on providing technological services for the insurance intermediary sector. In addition to Chengdu, the company has operational centers in South China, Central China, North China, and East China, and has established the core brand "Zhibao Cloud."

Leveraging years of experience and research in the insurance industry, the team employs advanced technologies such as mobile Internet, big data, and artificial intelligence to deliver solutions for industry clients and drive the digital transformation of the industry. The company has received strategic investments from government-guided funds and insurance industry funds. It has developed technology products for insurance agents, brokers, bancassurance agents, insurance valuation, insurance companies, and new MGAs. Additionally, it has launched expansion modules for enterprise services and agent services, and has established an innovative business cooperation value chain with numerous insurance companies and renowned third-party service institutions, promoting the comprehensive digital upgrade of the insurance intermediary industry and supporting the high-quality development of the insurance industry.

The Course of Development

2017

Founded

Founded in Shenzhen in November, moved to Chengdu Hi-Tech Zone in the following year and expanded its R&D center and operation service center.

2018

Angel Round

Invested by Qifu Capital and Hunan Xiangjiang New District Government, joined China Insurance Information Technology Committee.

2019

PreA Round

Insurance intermediary clients exceeded 100, the premium scale of service clients exceeded 1 billion, the annual growth rate of client scale and revenue scale maintained 200%, and gained investment from Shenzhen Qianhai Lihui Fund.

2020

Eagle Enterprise

More than 200 cooperative customers, won the Eagle Enterprise, and obtained the third level of equipoise filing.

2021

A Round

Cooperative insurance intermediaries exceeded 400, annual life insurance premiums exceeded 5 billion RMB, cooperative insurance companies exceeded 130, selected as a national high-tech recognized enterprise, obtained CMMI-3 certificate, and received Series A investment.

Investors



启赋资本
QF Capital

Hunan Provincial Government Industrial Guidance Fund, mainly funded by the local government, with a capital scale of more than 10 billion yuan, entrusts the well-known venture capital institution "Qifu Capital" for investment management. Successful investment cases include: Pop Mart, who to learn from.

The investor, Changsha Pilot Investment Holding Group Co., LTD., based on the principle of "government guidance and market operation", focuses on the development of the area, relying on Changsha, facing domestic and foreign markets, and forming an industrial cluster with "prominent main business and obvious advantages". The company has vigorously developed financial investment, financing and investment go hand in hand. The company has become the first state-owned enterprise in Changsha to obtain international investment grade rating and successfully issue overseas bonds. The company has successfully invested in nearly 30 industrial projects, with obvious economic and social benefits.



Shenzhen Qianhai Lihui Fund Management Co., LTD. (hereinafter referred to as "Lihui Fund") was established in March 2014. It is a private equity investment fund manager registered and filed with Asset Management Association of China, a council member of All-United Merger and Acquisition Association and a joint member of Insurance Asset Management Association of China.

The company was awarded the "2016 China Excellent Local PE Management Institution" at the 11th China (Shenzhen) Private Equity Summit Forum; In 2019, it won the award of "Top Ten Investment Cases in China's Internet/Mobile Internet Industry" in 2018-2019 by Financing China. Focus on private equity investment in enterprise services, new consumption and high-end equipment manufacturing, and invest in the layout of private equity investment business. It has carried out in-depth and long-term cooperation with banks, insurance, securities brokers, state-owned enterprise financial holding platforms, well-known investment institutions, etc., and has filed and issued 18 fund products with assets under management of more than 10 billion yuan. Well-known cases are: Tongcheng Yilong, Global New material, private equity row network, etc.

Founding Team



CEO
Lebin Guo

Financial professional elite, once worked in Taikang Life Insurance, AIA, and Huimeng insurance Agency, successively served important positions such as sales department manager, channel business director, and head of technology business. He has been in the industry for many years and is familiar with insurance, financial technology and other businesses.



COO
Cheng Zhang

With a double degree in finance and computer science, he has served as product manager of Tencent, product director of Fetion of China Mobile, general manager of overseas business department of WOQU.com. He has unique insights and deep understanding of Internet platform operations, and has extensive experience in business development and team management.



CTO
Jun Lu

Graduated from the University of Electronic Science and Technology of China with a major in computer science. He used to be a senior architect of Hewlett-Packard and was responsible for the development of the business management system of Fuji Insurance Company(Japan). He has rich experience in insurance business research and development.

Core Team Members



Director/Partner
Hualin Tang

Joined Qifu Private Equity Fund Management Co., Ltd. in June 2017, serving as secretary to the chairman, director of the post-investment management department & head for legal affairs, responsible for corporate legal affairs of Qifu Private Equity Fund Management Co., Ltd. and post-investment management of investment projects, Once led and participated in GSX (NYSE: GSX), Pop Mart (HK.09992) overseas restructuring and listing, and full exit after investment. Now he concurrently serves as the supervisor of Pinshanghai (to be listed) and the director of Anzhi Ecology.



Director/Partner
Xiaoqian Cai

FMBA from Tsinghua University and The Chinese University of Hong Kong, a double bachelor degree in computer and finance from the University of Electronic Science and Technology of China, has been engaged in research and investment management in many securities companies, has long focused on corporate services, financial technology, and new consumption and other fields of investment, Served as a director of a number of start-up companies to coach the growth of the company, has rich industrial resources and keen market insight.

Core Team Members



Chief Scientist
Tong Luo

Graduated from Tsinghua University, Institute of Automation, Chinese Academy of Sciences and the University of South Florida, United States, focused on machine learning and data mining, special researcher of Shenzhen International Graduate School of Tsinghua University. He led a team to develop Uptake in the United States, and was rated as one of the top ten semantic search applications in the world by the New York Times; developed the first domestic knowledge graph covering all the subdivisions of finance and millions of relationships.



Chief Advisor
Jingcai Huang

Master of Business Administration from the British School of Business Management, Ph.D. in Political Economics from Wuhan University, Postdoctoral in Applied Economics from the Institute of Finance, Chinese Academy of Social Sciences. Served as Vice President of AIA Malaysia, Chief Operating Officer of Hong Leong Insurance, and First General Manager of Generali China. He has rich management experience and was one of the first insurance experts to introduce the insurance agent system into China.

Corporate Philosophy

Vision

The most trusted
insurTech service
platform

Mission

Contributing to the
high-quality
development of the
insurance industry

Values

Focus
Expertise
Innovation
Security

**Realize digital intelligence
transformation and upgrading**

Differentiated Management

Customer Focus Only

No direct or indirect insurance sales, ensuring brokers have peace of mind.

System Compliance

The China Banking and Insurance Regulatory Commission has confirmed that the system complies with regulatory requirements.

Flexible Payment

Flexible and stress-free payment options, providing continuous service and fostering growth alongside customers to achieve a mutually beneficial outcome.

More Than Software

Offer value-added services, including assistance with insurance product enrollment, agent training, and customer acquisition.

Zhibao Cloud Product Portfolio

Provide insurance intermediary full license, full insurance, full scene solution

Intermediary Cloud

Provide services to agents and brokerage companies, Support for all types of insurance.

Bank Insurance Cloud

Provide services to bank concurrent insurance Agents , supporting dual recording and system integration.

Smart Insurance Assessment

Provide services to Insurance Adjustment Company, support remote survey,repair feedback.

Smart Channel Connection

Provide services to insurance company channel scenario, sales control, fast product factory.

Distribution Cloud

Serving MGA distribution scenario channels to go online quickly, convenient for reconciliation and settlement.

Car Insurance Cloud

Serving part-time auto insurance agents and supporting dealer group management.

Travel Insurance Cloud

Serving part-time auto insurance agents.

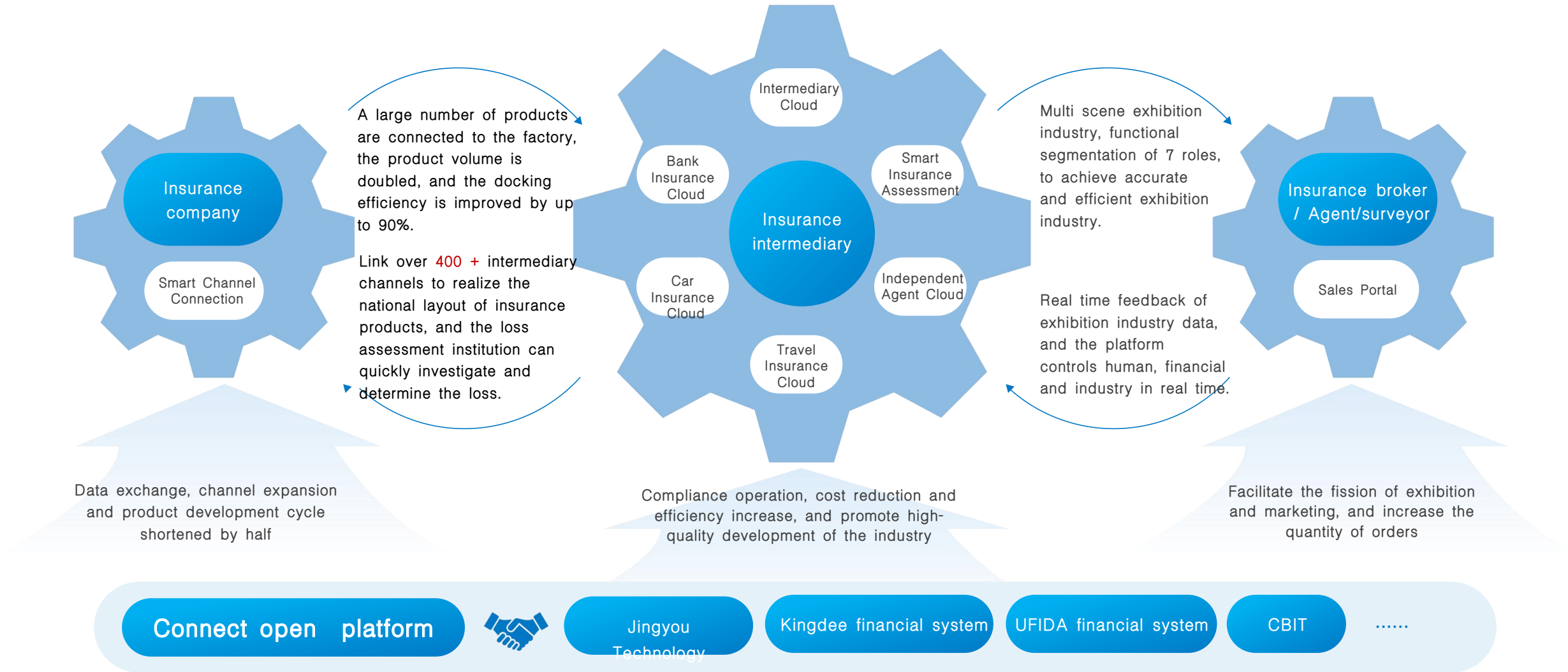
Independent Agent Cloud

Serving independent agent scenario, personal brand, easy management.

Connect Open Platform

Co-build, co-create, sharing and comply with the relevant data exchange standards and specifications of CBIT. Connect the industry data platform, and Open up the co-build other matching SDKs required by insurance companies and the industry.

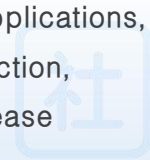
Enable high-quality development of the industry



Business Growth Service

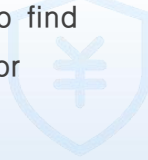
Open Platform

Service industry, integrate high-quality systems and applications, realize data interconnection, reduce costs and increase efficiency.



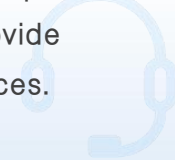
Insurance Preferred Service

Cooperate with the leading insurance companies to find high-quality products for intermediary agencies.



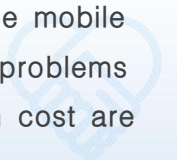
Healthy Service

Introduce major health products and institutions to provide customer health services.



Online Sales Platform

Based on the online insurance platform provided by the mobile exhibition terminal, the problems of compliance and high cost are solved.



Promotion & Lead Gen

Introduce high-quality customer traffic to achieve accurate targeting.



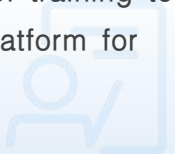
Scenarios customers acquisition

Equipped with product scenarios to create a diversified profit model.



Course training

Cover multiple types of training to create an exclusive platform for agents.



Industry Live Broadcasting

Industry KOL Live broadcasting to facilitate business development.



Information Technology Compliance Construction

智保云®
助力保险行业高质量发展

保险中介信息化合规建设 全套制度文档模板

▶ 律所核定 ▶ 免费申领

合规经营 提升业绩
【全国独家发布】

全套 **50** 份文档模版 (文件清单详见背面)



联系商务 扫码申领

智保云®
助力保险行业高质量发展

文件清单

1 信息化工作情况报告

信息化工作情况报告

2 岗位任命文件

首席信息官任命书

分支机构信息岗负责人任命书

网络安全负责人任命书

3 制度文件

信息化管理制度

信息化(安全保密合规)培训签到表

信息化突发事件应急处置报告

信息化突发事件应急预案演练记录表

系统回退和应急处置方案

信息安全管理制度与操作规程

信息化培训制度

信息化突发事件应急预案

个人信息保护制度

云服务提供商风险管理

信息安全与保密协议

终端设备管理制度

分支机构信息化督促记录

4 信息化规划与财务预算

信息化工作规划

信息化预算

5 采购合同

智保云采购合同

银保信业务数据查验服务合同

银保信业务数据查验服务授权书

财务系统采购合同

办公操作系统采购合同

办公软件采购合同

防病毒软件采购合同

6 资质证明文件

智保云等保三级备案证明

保险机构域名ICP备案证书

保险中介机构域名证书

财务软件相关资质证明(会计准则)

银保信应用基础支撑平台等保三级备案证明

智保云等保三级测评报告首页(DJCP章)

智保云软件著作权证书

智保云公司营业执照(成都市维思凡科技有限公司)

保险中介公司等保备案证明

财务软件等保备案证明

分支机构信息岗负责人从业资质证明

首席信息官从业资质证明

网络安全负责人从业资质证明

7 培训课件与证明

信息化培训课件

信息安全培训课件

信息化保密培训课件

培训签到表

培训视频录像

8 内控管理证明

定期安全巡检记录

定期数据恢复验证记录

9 等保所需资料

定级报告填写参考模版

信息系统安全等级保护备案表

信息系统申报表

预提交材料



联系商务
扫码申领

Based on its own industry experience, Zhibao Cloud has accumulated a full set of system document templates for the construction of insurance intermediary information compliance and provided compliance services for insurance intermediaries. Zhibao Cloud is also the first technology company to offer this service in the market.

Development Achievements

- The China Banking and Insurance Regulatory Commission confirms that "the system meets regulatory compliance requirements."
- In 2020, Zhejiang Province passed 100% compliance inspection.
- In 2021, Sichuan Province passed 100% of the informatization compliance inspection.
- Many partners, including insurance companies, MGA, TPA, insurance intermediaries, etc.

130+

Insurance companies

400+

Insurance intermediaries

1000+

Trial commercial organizations

4000+

Insurance intermediary branches

500,000+

Insurance brokers



Cooperation Values



Achieving Digital Compliance Transformation

Facilitate the digital transformation of insurance intermediaries and highly meet regulatory compliance requirements.



Cost Reduction and Efficiency Improvement

Through systematic operation, cost reduction is realized and efficient management is promoted.

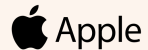


Ecological Empowerment

Connect with industry resource, develop industry and product ecology value chains.

Some Partners

Industry partners



Insurance agency partners

In November 2021, the industry media released the 2020 China Insurance Agent Top 100 List.

More than 30% of the head agencies in the list that have signed contracts with Zhibao Cloud, and more than 20% were Top100 institutions that signed up.



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Industry Cooperation-China Banking and Insurance Information Technology(CBIT)

Zhibao Cloud is the first insurance technology company to integrate with CBIT's three intermediary cloud platform services: insurance intermediary business information inspection, auto insurance intermediary system integration, and financial cloud hosting.

According to the latest data from CBIT on the number of institutions connected with various technology partners, Zhibao Cloud ranks first in both the number and output of institutions in the life insurance and auto insurance sectors.



Industry Cooperation-Technology Integration and Service

Kingdee 金蝶 | 智保云®

Kingdee and ZhibaoCloud reached Kingdee Eco-ISV cooperation. financial system integration to help intermediary informatization compliance.

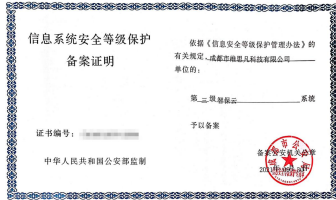
用友 | 智保云®
yonyou

Reached a cooperation on the Yonyou business innovation platform. Financial system integration to help intermediary informatization compliance.

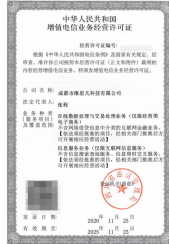
精友科技 | 智保云®
JINGYOU TECHNOLOGY

Zhibaoyun and Jingyou Technology reach strategic cooperation. Improve the efficiency of multidimensional control of public valuation and survey loss.

Security Foundation



National information security classified protection third level certification



Online data processing and transaction processing business license (EDI, Electronic Data Interchange) that meets the requirements of the "Data Security Law"



Security Partner with National Financial Technology Evaluation Center



ISO-27001 Information Security Management System International Certification



ISO/IEC 29151:2017 Personally identifiable information protection management system certification



ISO/IEC 27701:2019 Privacy Information Management System Certification



ISO/IEC 27018:2014 Public cloud personal information protection management system certification



In progress - TRUSTED CLOUD identification

Qualifications and Honors



Quality Service Integrity Enterprise



Honesty Operation Model Unit



Service-Oriented Credit-Keeping Enterprise



Enterprise Credit Rating Certificate - AAA Level



Contract-Honoring and Credit-Keeping Enterprise



Enterprise Credit Rating Certificate

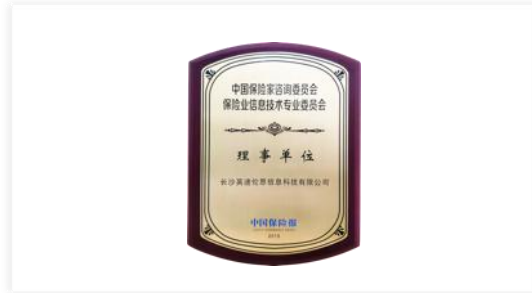


Quality-Oriented Credit-Keeping Unit



National High-Tech Enterprise Certification

Qualifications and Honors



Member of the Insurance Industry Information Technology Professional Committee



"Outstanding Contribution to InsurTech Award" at the 3rd Asia-Pacific Internet Insurance Summit



"Excellence Award" in the 2021 Insurance Technology Innovation Competition



"Insurance Intermediary Technology Star of the Year" in the 2022 Today's Insurance Intermediary List



CMMI-3 (Capability Maturity Model Integration Level 3) for Software Capability



Member of the Information Technology Application Innovation Working Committee



Product Mutual Recognition Certificate from UOS (Unified Operating System)



Recipient of 3 patents, 18 software copyright certificates, and a total of 121 intellectual property rights

Service Advantages

Rich Experience

- 400+ successful service cases.
- Rich experience in online service and on-site investigation of institutions

Team support

- Business manager team: each organization's exclusive system, compliance and system consulting Q&A
- Implementation consultant team: system configuration, delivery, use training, problem solving
- Customer success manager: relationship maintenance, regular return visits, in-depth use guidance, assist customers in internal system promotion and implementation.

Core Services

- Exclusive CSM regular return visits.
- Exclusive CSM business consulting.
- Demand & bug response & processing.
- Customer service: 7 * 24 service hotline, online consultation.
- System iterative update and training.
- Industry information exchange, practical case sharing.

Industry Association Activities



- **2021.05** Shanghai Insurance Association-Shanghai Insurance Thoughts Exchange
- **2021.05** Fujian Insurance Association-Interpretation Training Seminar on the Supervision Measures for Informatization of Insurance Intermediary Institutions
- **2021.05** Zhejiang Insurance Industry Association-Insurance intermediary information construction and data security activities
- **2021.09** Jiangsu Insurance public adjustment intermediary Construction Plan Exchange Meeting
- **2021.09** As a system supplier that meets the requirements of the Measures, Zhibaoyun was invited to participate in the online system demonstration meeting of the Yunnan Insurance Industry Association.
- **2021.10** Zhibaoyun was invited to participate in the Guangxi Insurance Industry Association learning conference, and many services were highly appreciated.
- **2021.10** Participate in industry research of China Insurance Industry Association.



Industry Voice

中国银行保险报
CHINA BANKING AND INSURANCE NEWS

寿险中介转型发展 远程研修班

2021年9月27日—9月30日
线上20小时培训

九、保险中介机构信息化解决方案

9月30日 14:00-16:00

分享嘉宾：郭乐彬
智保云创始人兼CEO

2021.09

Zhibao Cloud was invited as a guest of "Life Insurance Intermediary Transformation and Development Seminar" by China Banking and Insurance News to share the course of "Insurance Intermediary Information Solutions"

2021年08月
双月·总第270期

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2021.08

Zhibao Cloud's contribution to promoting the transformation of information technology in insurance industry: the new exploration of SaaS+ data service was selected in the fourth issue of Zhejianginsurance in 2021. It is the only insurance technology company selected.



2021.10

Wuzhen Insurance Science and Technology Festival- Share the digital ecological topic of insurance intermediaries.



2021.06

Yonyou Eco-Conference

智保云 × 精友科技

共建生态服务 赋能行业发展

「智保云 × 精友科技」产品介绍暨战略合作发布会

活动时间：2021.12.14 14:00

2021.12

"Zhibao Cloud X Jingyou Technology" product introduction and strategic cooperation conference.

中国保险中介生态圈蓝皮书 2021

清华大学五道口金融学院中国保险与养老金研究中心 编著
今日保（北京）信息技术研究院有限公司 编著

2021

The Company is Featured in the 2021 China Insurance Intermediary Ecosystem Blue Book



Industry Voice



- 2018 Settled in Hunan Financial Center
- 2020 China Insurance Intermediary Industry Summit Forum
- 2021.05 Digital Insurance · Industrial Innovation series activities, JD Health "Home Medical Insurance" product launch conference
- 2021.06 Seminar on Informatization Compliance Construction of Insurance Intermediaries
- 2021.07 The Third Asia-Pacific Internet Insurance International Summit
- 2021.07 Insurance Intermediary Financial system Solutions Special session
- 2021.08 Seminar on Information security scenarios of Insurance intermediary Business
- 2021.10 Product explanation meeting and information compliance construction solution live broadcast special
- 2021.10 Wuzhen Insurance Science and Technology Festival - Digital ecological Sharing of insurance intermediaries
- 2021.10 Ecological Conference on Informatization Compliance Construction of Insurance Intermediaries
- 2021.11 The Fifth Asia Pacific Health International Summit - Digital innovation enables high-quality development of insurance ecology
- 2022.04 Digital marketing helps insurance intermediary business breakthrough
- 2022.06 Cloud Forum on Digital Development of Insurance Intermediaries



Technology Enhancing the Beauty of Insurance

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