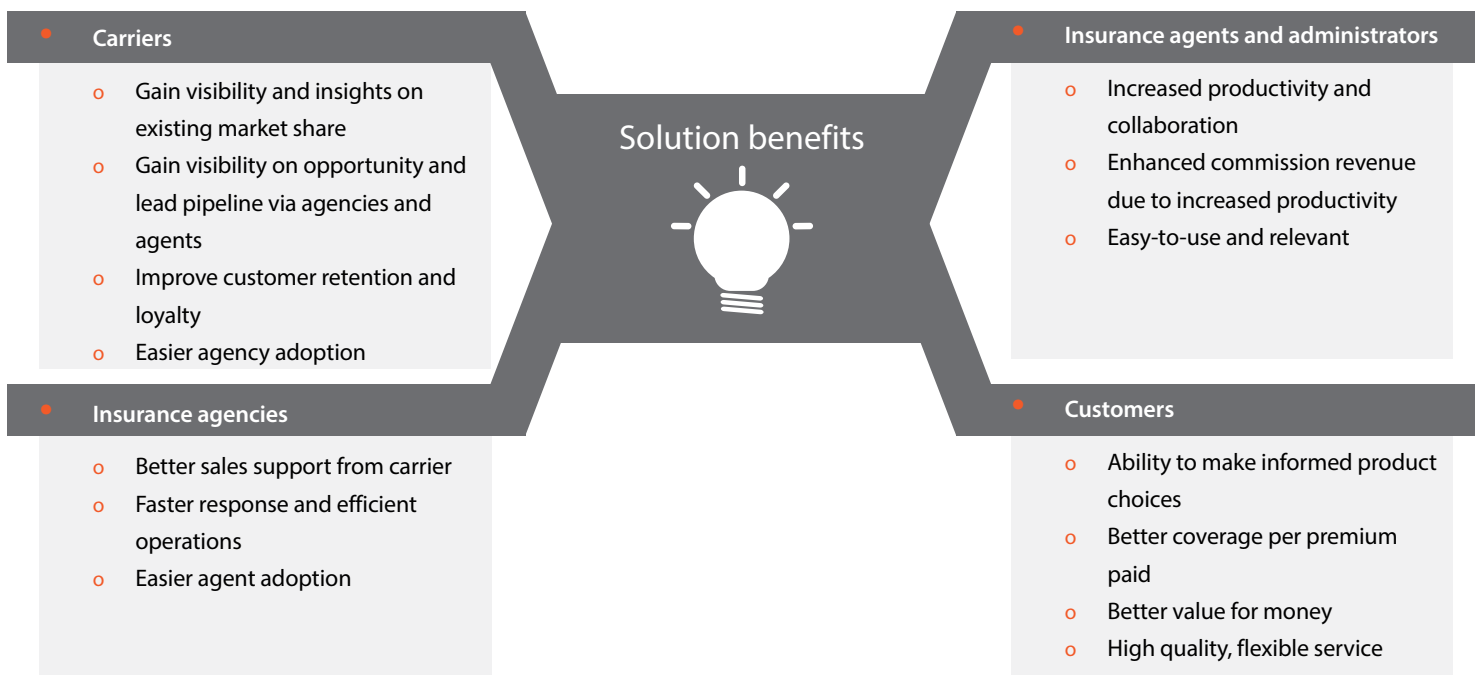


## Agency Relationship Management Solution (ARMS)



ARMS provides a comprehensive relationship management solution for producers in the insurance industry. It allows carriers to grow market share, agencies to experience increased revenues, and agents to earn better commissions.



### Operational relevance

#### Applicability

Property and casualty, life and wealth management, auto insurance, and household and commercial lines of business.

#### Capability

Unified user experience, multichannel

support, seamless document management, enterprise application integration, capture and prefill utility, knowledge management, intelligent work routing, security and access control, audit history, and multi-lingual support.

#### Compatibility

Works on all operating systems supported by Microsoft CRM and is operational on both on-premise and online modes.

#### Mobility

Also available on Microsoft-compatible tablets and smartphones.

## Solution features

### Agent-centric solution

- Enables independent agencies / agents to deal with multiple carriers
- Repository for all insurance products from various carriers
- Facilitates product comparison, assisting agents in evaluating and recommending the best-fit product
- Not limited to a single carrier; provides customers plenty of choices to select from

### Dashboards

- Customized and preconfigured dashboards for carriers, agencies, and agents
- Configurable daily activity dashboards
- Device-agnostic HTML front end

### SharePoint integration

- Seamlessly integrated document management
- Customer care portal
- CXO dashboards

### Sales process

- Maintain clear hierarchies of agencies and agents
- Collaborate with other agents on opportunities by cross-sharing of information and easy integration with enterprise communication tools
- Faster and improved lead-to-policy conversion

### Service request management

- Logging of service requests automatically through self-service portal and manually through agents
- Tracking requests to closure
- Associating parties to a service request
- SLA management

### Trip planner

- Bing Maps integration for easy trip planning for customer / prospect visits
- Identifying customers within a specified perimeter for better coverage and agent allocation
- Auto-creation of appointments

### Social media integration

- Facebook
- Twitter

### Product suggestion

- Analyze customer data to suggest suitable products to aid cross-sell and upsell

### Automated assignment

- Auto assignment of leads and cases based on user skill set and territory

### Configurators

- ZIP code configurator
- Phone number format configurator
- Auto sequence number generator – sequential unique identifier auto-generated for every record in an entity based on the rules configured

### Additional features

- Lync integration
- Age-as-of-date calculation

For more information, contact [askus@infosys.com](mailto:askus@infosys.com)

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