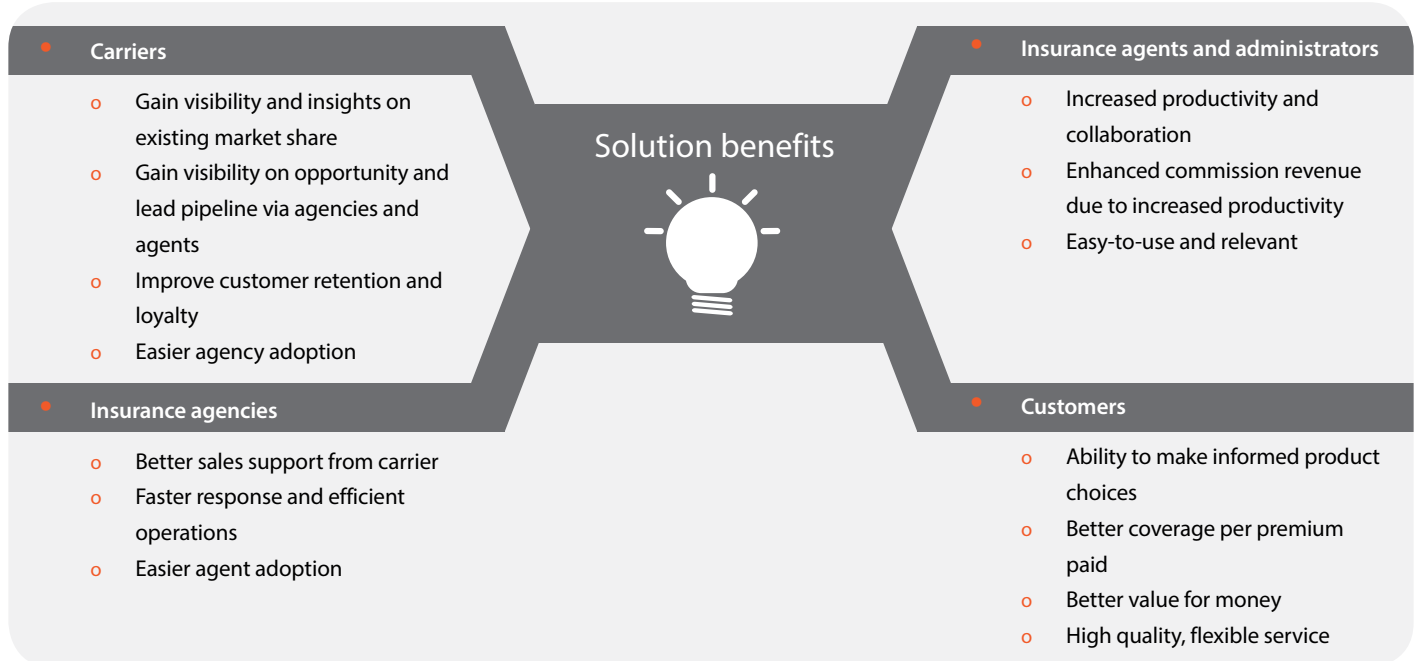


Agency Relationship Management Solution (ARMS)



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

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