

INSURANCE AGENCY RELATIONSHIP MANAGEMENT SOLUTION

An oversaturated market that doesn't look like it can take any more. Market participants find their product offerings reduced to commodities. That sums up the difficult situation in the property and casualty (P&C) as well life insurance market.

P&Cs face significant revenue growth pressures. The market is not generating much in terms of new demand; therefore P&Cs are often forced to nibble away at the competitor's customer base to up their market share. The popularity of Internet insurance, thanks partly to the advanced insurance options this channel provides, is redefining classical insurer–customer relationship. Life insurers, on the other hand, are challenged by disruption in the distribution channel since experienced agents are considering retirement.

Both P&Cs and life insurers have similar goals in mind. These include growing market share through their distribution channels, growing premium revenue and share of customer wallet, managing pricing policies effectively, attracting the new generation of customers, improving investment returns, and address complex regulations. Insurance carriers are investing more and more on the field distribution channel to provide much-needed personal touch to their customer relationships and drive growth. New advances in technology are helping carriers provide producers with deep insights about prospects and customers and make offerings that are more contextualized and based on customer need, so customers find them hard to resist.



Insurance Agency Relationship Management Solution provides carriers with key capabilities and features, enabling their producers to gather customer insights and generate accurate and consistent information as well as messaging, thus helping them stand out in a crowded

and hypercompetitive market. Agency Relationship Management Solution addresses end user business functionality at three levels – carrier, insurance agency, insurance agent and administrator. In addition, it provides for a self-service portal that delivers better service to the customer.

Further, it provides answers that map to every group's goals and helps the carrier grow market share; the agency, revenues; agents, commission. The customer, for her/his part, gets the best possible deal and service.

The solution leverages the Microsoft Dynamics 2013 platform to deliver the core functionalities and includes social and mobile capabilities.

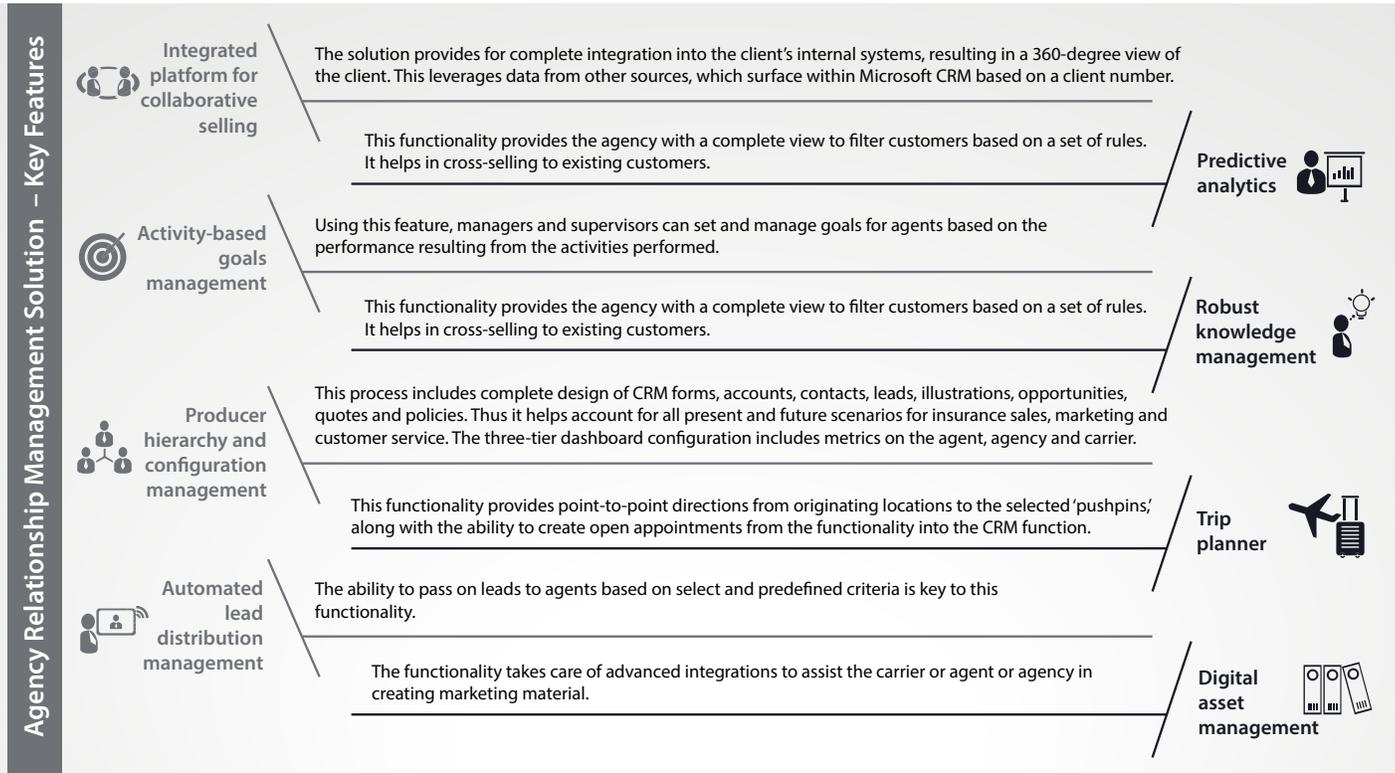
Insurance Agency Relationship Management Solution – Overview

The solution is equally applicable to instruments in the area of property and casualty, life and wealth management, as well as to households and commercial lines of business. Agency Relationship Management Solution is directed at the sales, marketing and customerservice functions in the insurance business.

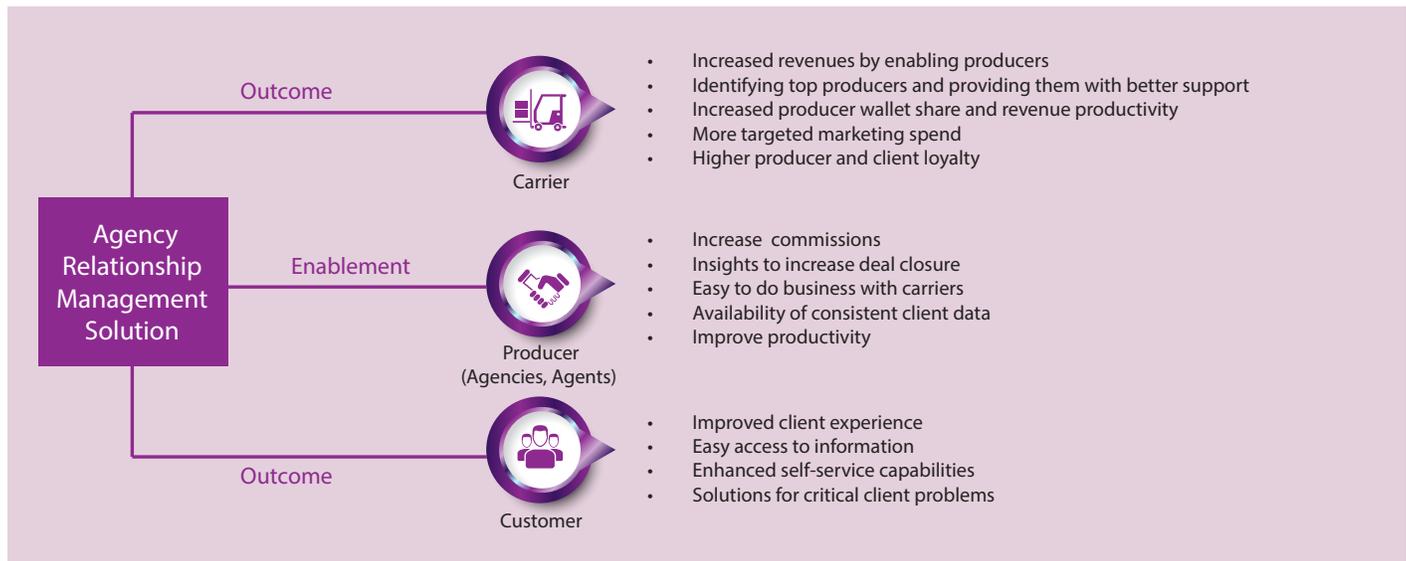
Agency Relationship Management Solution works across all operating systems supported by Microsoft CRM 2013. It's operational in both on- premise and online modes, and can be used with Microsoft-compatible tablet computers and smartphones.

Cross-functional capabilities include unified user experience, multi-channel support, document management, enterprise application integration, capture and prefill utility, knowledge management, intelligent work routing, security and access control, audit history and multilingual support.

	Campaign management, collateral management, social media intelligence, prospect research, spend management, market segmentation and analysis and customer loyalty and rewards
Sales	Collaborative sales, prospect and lead management, quote and bind, producer activity management, performance management, goals management and business plan management
Service	Customer and service request management, renewal management, service-level agreement (SLA) management, customer feedback management, self-services and e-signature, and 360° view of customer and producer



Benefits



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