

# Microsoft Dynamics CRM

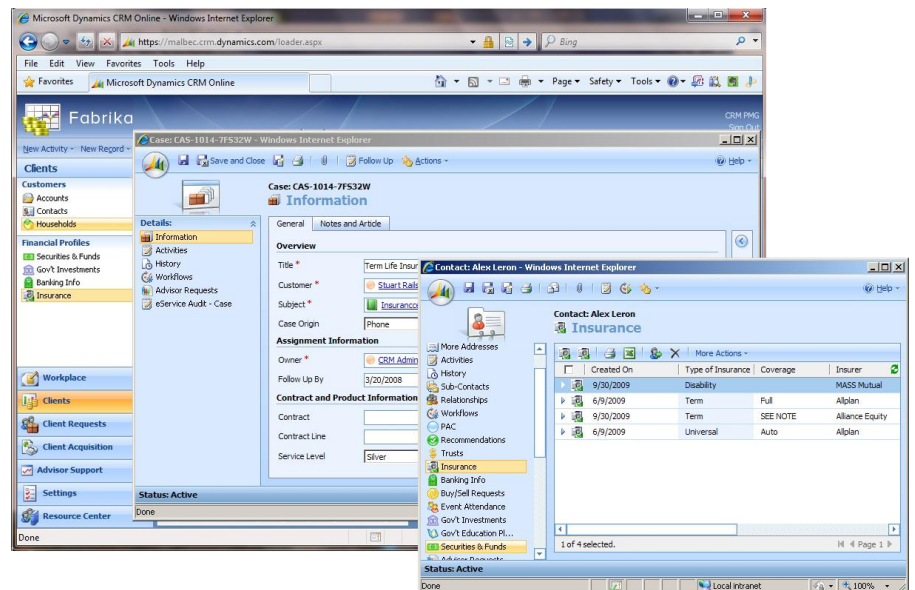
## For Insurance

### BENEFITS

- **Increase operational efficiency.** Automate repetitive manual tasks and eliminate duplicate data re-entry by creating one central source for all policy holder information.
- **Improve customer loyalty.** Show your customers you know and care about their needs. Track client contacts centrally, create nurture campaigns to strengthen ties, and identify the right products and services to meet client-specific needs.
- **Acquire new business.** Conduct integrated, multichannel marketing campaigns and track response and close rates, focusing on the most effective activities and giving agents specific follow-through steps.
- **Optimize policy renewals and up-sell opportunities.** Comprehensive workflow, analytics, and case management capabilities help ensure that every opportunity is tracked through its life cycle.
- **Improve service.** Empower all agents and service staff with the tools and information they need to efficiently and profitably deliver high-quality, personalized service during all interactions, and across all channels.
- **Monitor agent performance.** Track each agent's performance and create alerts to identify agents who may need additional training and education.
- **Extend existing IT investments.** Integrate Microsoft Dynamics® CRM with other mission-critical business applications and existing Microsoft products and technologies to maximize the value of current IT investments.

### Drive agent and broker productivity, build policy holder trust, and deliver services that meet demanding needs through collaborative customer knowledge.

Insurers are increasingly turning to a customer-centric approach that helps them reduce operating costs while better equipping agents, brokers, and service representatives to improve the customer experience. A well-defined and executed customer relationship management (CRM) strategy, with Microsoft Dynamics CRM at its center, helps enterprises focus on key imperatives that impact costs, premiums, new business, and renewal rates.



*Microsoft Dynamics CRM underwrites the success of insurance carriers, brokers, and agencies globally. Providing leading solutions for sales, marketing, and service means better insights into your business, your policy holders, and your products.*

**A powerful CRM platform.** The familiar Microsoft Dynamics CRM interface makes it easy for agents, brokers, and call center staff to do their best work with minimal training. Ease of integration with familiar Microsoft products and technologies helps expand the reach of CRM information to teams and executive decision makers.

## FEATURES

## BENEFITS

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### Centralized Policy Holder Information

Integrate sales, marketing, and customer service functions, allowing your agents and service representatives to access and share complete information across departments, product lines, channels, or intermediaries. Each member of the client service team has access to information that includes customer profile and history, relationships, and support records, increasing client confidence and improving office productivity. Information on prospective accounts is captured, so even if they don't accept the initial quote and move to policy origination, you can keep them as a lead and contact them again.

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### Agent Productivity

Collect and share deeper levels of customer knowledge to improve service levels at key points of the client relationship, such as during renewal, and to enable client-facing professionals to identify the most appropriate products, whether term life, annuity, auto, or home.

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### Workflow Automation

Automated alerts and customizable workflow can help agents, brokers, and service representatives maximize opportunities to cross-sell products and services, and reduce the time required to resolve inquiries. Automated workflow streamlines processes across functional components including underwriting, policy, and claims systems.

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### Business Intelligence

Import data from back-end systems and use business intelligence capabilities to create dashboards and reports on agent/broker productivity, new business success, client loyalty, claims processing, and more.

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### Marketing

Identify high-value clients and develop appropriate, targeted marketing campaigns. Attract more new clients by easily tracking leads and better managing opportunities. Identify connections between primary policy holders and family members. Automated alerts and customizable workflow can help agents and brokers improve service at renewal, maximize opportunities to cross-sell products and services, manage policy renewals, and reduce the time required to resolve customer inquiries.

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### Compliance Management

Incorporate regulatory and compliance changes to help ensure products and policies are being sold and managed in full compliance. Centralize and streamline claims contact management with automated workflow to help ensure all steps are completed on time and within approved, compliant processes.

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### Integration with Existing Systems and Industry-Specific Partner Solutions

Integrate existing or custom-developed underwriting, policy, and claims administration systems in a composite view, freeing up agents and brokers to manage relationships. Microsoft Dynamics CRM has been designed using industry standards, including ACORD messaging, which makes it easy to integrate into your enterprise architecture.

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### Platform Integration with Microsoft Products and Technologies

Connect with Microsoft products and technologies including desktop applications, Microsoft® Office SharePoint® Server, Microsoft Unified Communications, Microsoft SQL Server®, and Microsoft BizTalk® Server to enhance communication and collaboration, deploy enterprise content management, deliver business intelligence, and tailor process automation.

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### Familiar Look and Feel

Deliver customer relationship management tools and capabilities in a familiar, easy-to-use interface, helping your agents and representatives focus on delivering the fast, effective service that builds loyalty and satisfaction. Enhance communications using easy-to-use and well-known desktop tools, such as the Microsoft Office system and Office Outlook®, helping to increase user uptake and lower cost of learning.

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### Fast, Flexible, and Easy to Deploy

Get up and running quickly using Microsoft Dynamics CRM as an online solution, or deploy an on-premises solution for greater system customization, control, and ownership. Regardless of the deployment option, you get the same great user experience and solution.

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For more information about Microsoft Dynamics CRM, visit: [www.microsoft.com/dynamics/crm](http://www.microsoft.com/dynamics/crm)

To learn more about Microsoft Dynamics in the insurance industry, visit:

[www.microsoft.com/dynamics/en/us/industries/financial-services.aspx](http://www.microsoft.com/dynamics/en/us/industries/financial-services.aspx)