Microsoft Dynamics CRM for Insurance

Microsoft Dynamics

Boost customer retention, proactively manage risk, slash operational costs, and more effectively monetize customer data with Microsoft Dynamics CRM.

Insurers are increasingly turning to a customer-centric approach that helps build stronger customer relationships while improving productivity. By equipping agents, brokers, sellers, and service representative with a single 360-degree view of customer information combined with real-time analytics, and process automation, Microsoft Dynamics CRM helps insurers maximize the profitability of each customer by providing tailored offers and personalized services that improve satisfaction and build trust.

### Increase Operational Efficiency

Create a central repository for policyholder information, streamline data input, eliminate redundancies, and make it easier for staff and brokers to find information. Automate customer- facing tasks with powerful workflows, leading to reduced overhead costs.

Improve Customer Loyalty

Track client demographic data and interaction history, create nurture campaigns, identify the right products and services, and provide more personalized service with holistic customer management capabilities.

Optimize the Sales Process

Instantly create new quotes, better capitalize on cross-sell and up-sell opportunities, and drive policy renewals with powerful deal tracking and workflow, and visibility into customer preferences and buying behavior.
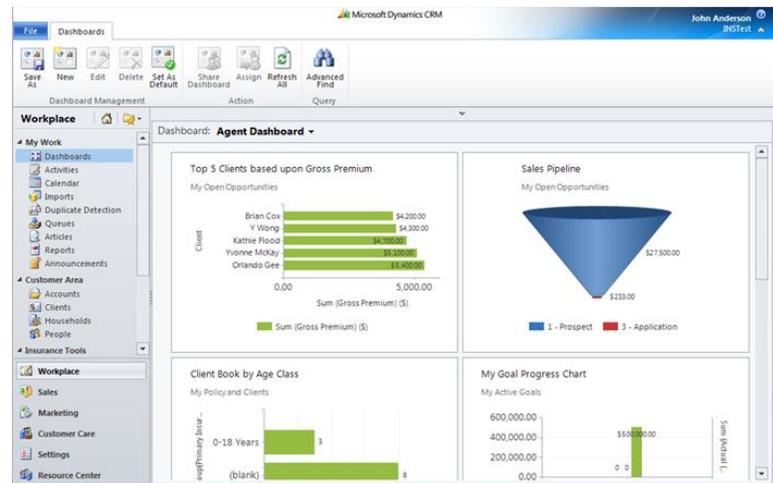
Arm insurance sellers, agents and brokers for success with deep insight into your policy holders and products.

Improve Service

Empower all agents and service staff with contextual analytics, intuitive case tracking, and collaboration tools to deliver high-quality service across all channels. Streamline claims handling, escalations and processing using powerful workflows.

By automating commission payments through Microsoft Dynamics CRM, we have increased one segment of business tenfold, without needing extra accounts people to manage the business processes.

Peter Leahy, Head of IT, Endsleigh Insurance

Monitor Agent Performance

Track each agent's performance and activities, provide valuable sales tools and personalized training, and proactively execute corrective measures to boost agent performance and loyalty.

Acquire New Business

Conduct integrated, multichannel marketing campaigns, seamlessly track and convert leads, and identify the most effective marketing activities as you optimize your marketing mix.

Build Long-Term Relationships

Better manage broker and customer relationships, building loyalty based on trust by providing greater transparency and personalizing service.

Extend Existing IT Investments

Take advantage of the inherent flexibility of Microsoft Dynamics CRM to integrate with mission-critical business applications and existing Microsoft products to maximize the value of current IT investments.

Our people have been freed to spend more time on direct contact with the broker because many processes have been automated and manual intervention is no longer necessary.

Vincent Jacobs, Customer Focus Manager, Allianz Belgium

Take Advantage of the Cloud

Benefit from Microsoft's multi-billion dollar investment in the cloud, leading security infrastructure, and a 99.9 percent uptime SLA with Microsoft Dynamics CRM Online.

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Native Microsoft Outlook User Experience

Enable your people to work using an application they're already familiar with: Microsoft Outlook. With a native Microsoft Outlook user experience, Microsoft Dynamics CRM helps make CRM easier to adopt and cuts down on training time and cost by using tools people already know.

Centralized Policy Holder Information

Give your staff and agents role-based access to customer history, preferences, key relationships, profitability, and support records, helping them to increase client confidence and improve productivity.

Workflow Automation

Reduce busy work, automate paper based processes, simplify policy applications, streamline approvals, and speed issue resolution with robust workflows. Streamline underwriting, policy issuing and claims processing with guided dialogs and alerts.

Actionable Analytics

Deliver powerful, contextual analytics and key performance indicators to the desktops of sellers and brokers on new policies, client communications, claims processing, and more so they can make better-informed decisions. Keep up with the business using real-time dashboards that provide insight into clients, brokers, risk exposure, sales activities, and sales performance by region, branch, and agents.

Improved Sales Execution

Provide agents with alerts and targeted recommendations based on customer information so that they can maximize opportunities to cross-sell products better, provide more tailored offers, and better manage policy renewals. Empower team selling by providing collaborative tools and a single source for all customer information.

Mobile Access

Enable mobile employees to work productively using a variety of mobile devices to access client and product information, contact customers, receive alerts, and more. Help ensure advisors are better prepared with access to customer data, preferences, and account holdings no matter where they are.

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Compliance Management

Manage regulatory and compliance requirements to help ensure products and policies are being sold and managed in full compliance. Centralize and streamline claims and contact management with automated workflows to help ensure all steps are completed on time and within approved, compliant procedures.

Marketing Automation

Identify high-value targets and develop targeted marketing campaign to attract new clients. Microsoft Dynamics CRM enables your organization to more effectively segment customers, build lists of prospects, create and manage campaigns, and measure return on investment.

Deep Integration

Integrate data from underwriting, policy administration, and claims systems into a composite view, providing agents and brokers with a holistic view to better manage relationships. Microsoft Dynamics CRM has been designed using industry standards, including ACORD XML, which makes it easy to integrate into your existing environment.

Easy Customization

Take advantage of drag-and-drop customization tools and a flexible object model to tailor Microsoft Dynamics CRM to the specific needs of your organization so you can bring new services to market quickly and cost-effectively.
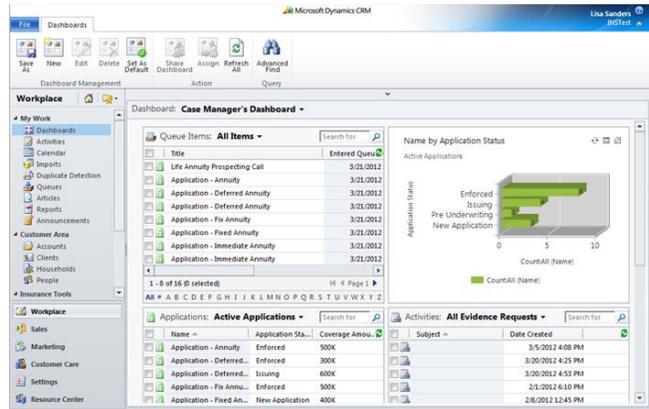
Accelerate service and streamline operations with familiar tools and real-time visibility into customer information.

Jumpstart Productivity with Microsoft Products

Capitalize on the powerful capabilities of productivity focused solutions like Microsoft Office, Microsoft Lync, and Microsoft SharePoint Server right within Microsoft Dynamics CRM to accelerate real-time communication, enable enterprise-wide collaboration, streamline content development, and improve document management.

A Vendor You Can Trust

Benefit from working with Microsoft, a vendor with over 30,000 engineers, that invests over $9 billion in R&D annually, has partners in 82 countries, and provides Microsoft Dynamics CRM through multiple delivery options all based on the same architecture: on-premises, cloud, and partner hosted.

Contact a Microsoft partner to find out how Microsoft Dynamics CRM can help your business.
Or to find out more about Microsoft Dynamics CRM, visit: http://www.microsoft.com/dynamics/crm
United States and Canada toll-free: (1) (888) 477-7989 Worldwide: (1) (701) 281-6500

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