

CRM Solution for INSURANCE CARRIERS



Your customers are moving faster. How will you follow them ?

Over the past decade customer behaviour and expectations have drastically changed. Insurance customers are becoming harder to attract and retain. Sales costs are high because of the lack of integration between agent and carrier systems, resulting in fragmented views of customer households and consumers' changing needs.

Insurer carriers are increasingly turning from a policy-centric to a customer-centric approach that helps them reduce operating costs while better equipping agents, brokers, and service representatives to improve the customer experience.

TRAVIATA SUPPORTS YOUR JOURNEY TO CUSTOMER-CENTRICITY

As an Insurance carrier serving a direct or indirect distribution network or a mix of both, you are looking for Industry Solutions that allow you to be more productive when collaborating, transacting and servicing clients across channels and devices.

These solutions should support you in driving customer acquisition and retention, achieving break-through business insight and supporting mission critical operations, whilst being able to evolve with your business with a perfect control over the budget.

Here's the good news: you are not forced to tackle these challenges alone! Increase customer engagement, channel optimization, customer retention and premium growth and claims follow-up with Traviata CRM for Insurance Carriers.

Our solution includes insurance specific business processes. We support insurance carriers with omni-channel delivery solutions, enabling you to be present in the financial lives of your customers any time, any place, across any channel or device.

KNOW YOUR CUSTOMERS

Knowing your customer is always a priority: talking about a "relationship" with a customer, point of sale, branch or broker is only possible when you know who he is, what products or services he prefers and how he would rather keep in touch with your company.

All activities in sales, marketing and support benefit from a thorough knowledge of the customer (or broker): his contact information, history and specific needs, but also his preferences, should be easily accessible in a comprehensible way.

The Single View of the Customer centralizes information about your parties (policy holders, beneficiaries, ...) that is often spread over different departments in one single 360° view: current policies, opportunities, open claims, alerts, assets and liabilities, accounting balance, ...

POLICY MANAGEMENT

Traviata includes many features to manage policies directly in the system or by retrieving information managed in another system. You can easily access the information related to a policy such as the policy holder, the beneficiaries, risk objects, clauses, account balance, etc.

Policy management is articulated around a policy lifecycle: being created (from a quote), active, suspended, being cancelled, cancelled. With policy versioning, you can track all changes in policies into separate versions.

DISTRIBUTION NETWORK MANAGEMENT

When working with intermediaries (B2B2C business model), Traviata can support business processes focusing on the ani-



mation of the distribution channel and follow up on the sales pipeline. Whether you are relying on an internal network (agencies) or working with external companies (brokers), intermediary companies and their collaborators can be managed in the system.

The intermediary's single view will give you 720° overview of the broker, its agreements, mandates and commission, the composition of its portfolio, its business plan, goals achievement, etc.

CLAIMS MANAGEMENT

To get a real 360° view, it's not enough for insurance companies to see sales information like quotes, policies, etc. With Traviata Claims management, you can also handle your claims via definable steps. First, the identification of the party, policy details (with version) and type of incident. Next, the process which includes related parties, objects, place of incident, coverage based on guarantees of the policy, providers meeting the criteria (distance,...) to do the assistance, execution, claims amount, object value,....

PROVEN EXPERTISE IN INSURANCE

RealDolmen is a leading CRM provider with a special focus on Financial Services and years of expertise in Insurance. Many Insurers with thousands of CRM users already benefit from our CRM solution for Insurance Carriers, like AXA, AG Insurance, Delta Lloyd Life, Balise and many more.

System requirements

Natively built into Microsoft Dynamics 365/CRM.

SUPPORTED VERSIONS:

- Dynamics 365 (v. 8 & 9)
- Dynamics CRM 2016
- Dynamics CRM 2015
- Dynamics CRM 2013

SUPPORTED DYN365 PLANS & APPS:

works with **Sales App & Service App** (part of Dynamics 365 Plan, Customer Engagement Plan or separate apps)

SUPPORTED PLATFORMS:

- Dynamics 365 Online
- Dynamics 365 on premise
- Partner Hosted
- Cross-browser

FEATURE SUMMARY

SALES PROCESS

- Customer single view (360°)
- Lead generation & qualification
- Opportunity & Quotes management
- Full sales journey support (qualify, prepare, visit, report)
- Premium simulation/calculation tools
- Customers as an individual, company, or group
- Household management
- Account balance (follow-up payments)
- Know your customer (investor profile, segmentation, ...)

POLICY MANAGEMENT

- Policy single view
- Insurance products and warranties management
- Parties management (beneficiaries, policy holders, ...)
- Risk objects management
- Policy lifecycle (project, active, suspended, cancelled, ...)
- Policy underwriting
- Core Insurance management

DISTRIBUTION NETWORK MANAGEMENT (B2B2C)

- Brokers/agencies and their employees
- Broker single view (720°)
- Agreements, commission management and mandates
- Production figures
- Market shares and competitors

MARKETING AUTOMATION

- Target audience segmentation
- Multi-channel marketing campaigns
- Campaign responses
- ROMI (Return on Marketing Investment)

CLAIMS MANAGEMENT

- Customer claims
- Identification
- Claims process
- Intermediary support
- Self-service portal

OTHER

- Activity management (emails, todo's, appointments, ...)
- Reporting with real-time dashboards
- Outlook integration