ORACLE CRM ON DEMAND FINANCIAL SERVICES EDITION – INSURANCE SOLUTION

ORACLE
CRM ON DEMAND

THE WORLD'S MOST COMPREHENSIVE CRM ON DEMAND SOLUTION

- Easy to use
- Fast to deploy
- Powerful analytics
- Built-in contact center
- Prebuilt industry solutions
- Embedded marketing, sales and service best practices

With Oracle CRM On Demand Financial Services Edition – Insurance Solution you can grow production and improve agent loyalty. Oracle CRM On Demand Financial Services Edition – Insurance Solution is the first hosted CRM solution designed specifically for insurance professionals. It enables insurance agents and brokers to better leverage their clients' profile and portfolio information to identify cross-sell and up-sell opportunities and improve customer retention. Incorporating best practices from the insurance industry, Oracle CRM On Demand Financial Services Edition – Insurance Solution empowers agents with the right tools and insight to make them more efficient and effective, leading to increased revenues and improved agent loyalty.

IMPROVE REFERRAL MANAGEMENT EFFECTIVENESS

Oracle CRM On Demand Financial Services Edition – Insurance Solution enables a seamless process for agents to actively track referrals and leads. Starting with the contact profile, agents can view all referrals made by a particular client. As agents log each referral, new leads are immediately created, which ensures that referrals do not get lost in the system, thus improving follow-up rates and referral effectiveness.

BUILD STRONGER CLIENT RELATIONSHIPS

Agents build trust by demonstrating a solid understanding of a client's financial and personal needs and interests. Oracle CRM On Demand Financial Services Edition – Insurance Solution enables agents to track a client's interests, such as investment interests, like annuities or life insurance; or personal interests, like sports or hobbies. Whether to build personal rapport with a client, or to generate new sales opportunities, tracking client interests is a key component of establishing client relationships that generate future business.

OBTAIN CONSOLIDATED PROFILE OF HOUSEHOLDS

Oracle CRM On Demand Financial Services Edition – Insurance Solution provides agents with a complete 360-degree view of a client's household with full understanding of each household's financial and investment risk profile, including consolidated portfolios, leads, opportunities, notes, and tasks for all contacts in a household. Advisors are able to easily control their view of a household's financial profile by selecting which household members will be included in the consolidated household view. This provides advisors with instant access to important client information needed to effectively cross-sell and up-sell additional insurance and financial services products or to serve clients.

ACCESS COMPREHENSIVE UP-TO-DATE CLIENT PORTFOLIOS

Oracle CRM On Demand Financial Services Edition – Insurance Solution provides agent convenient access to a client's comprehensive portfolio of insurance policies so that they can deliver accurate, relevant, and customized advice to their clients. A portfolio hierarchy lets advisors track multiple levels of detail within a customer's portfolio. For example, a client may have a variable universal life insurance policy containing sub-accounts, and within each sub-account are specific holdings. Tracking this level of detail of the customer's investments increases the knowledge and understanding of the customer's financial picture, and allows an advisor to service the customer more effectively.

IMPROVE AGENT LOYALTY

Oracle CRM On Demand Financial Services Edition – Insurance Solution incorporates business processes that make it easy for agent to access important contact, household, and portfolio information to provide personalized service to their clients. Industry-specific enhancements tailored to insurance agents, combined with market-leading core CRM capabilities, equip agents with the sales productivity and effectiveness tools to maximize business performance. Since ease of doing business is a key factor in cultivating and maintaining agent loyalty, providing an intuitive and easy-to-use CRM solution will result in improved agent loyalty.

BOTTOM LINE

By offering compelling industry-specific enhancement and embedded business processes to improve sales effectiveness, Oracle CRM On Demand Financial Services Edition – Insurance Solution enables agents to better attract and retain customers and increase revenues, while maximizing your return on investment.

For more information on how the Oracle CRM On Demand Financial Services Edition – Insurance Solution can address your industry-specific CRM needs, call +1.866.906.7878 or visit www.crmondemand.com.

KEY FEATURES

REFERRAL MANAGEMENT

- Automatic lead creation
- Ability to view all referrals made by a particular client

HOUSEHOLD MANAGEMENT

- Single household view
- Household, financial, and investment risk profile tracking
- Consolidated portfolio, leads, opportunities, notes and tasks for a household
- Selective rollup of household members

PORTFOLIO TRACKING

- Consolidated book of business tracking
- Portfolio tracking
- Household-level policy portfolios
- Contact-level policy portfolios

LEAD AND OPPORTUNITY MANAGEMENT

- Easy lead creation, assignment and qualification
- Lead and opportunity revenue tracking

CONTACT MANAGEMENT

- Single view of client book of business
- Financial and investment risk profiles
- Consolidated portfolio, leads, opportunities, notes and tasks

EMAIL INTEGRATION

- Integration with Microsoft Outlook and Lotus Notes
- Automatically link incoming and outgoing emails with associated contacts, accounts, leads and opportunities