

# CRM FOR BROKERS

an insurance digital solution by  **BSynchro**

Insurance Brokerage is a specialized industry that targets businesses highly dependent on insurance knowhow and customer relations management. Insurers strive every second to satisfy their customers through targeted and tailored services that are quick, efficient, and competitive. BSynchro unites with Microsoft to bring you Falcon, the product that will help you achieve that with the click of a button!

FALCON

**20%**



By 2020, disruptive models and digital platforms could account for as much as **15 to 20%** of the P&C SME market.

**20%**



By 2020, revenues from broking for midsized and large customers could erode by up to **20%**.

**84%**



**84%** of executives agree that traditional organizations must evolve their business before they are disrupted.

**83%**



**83%** of executives expect CRM platform-based business models to become part of their growth strategy over the next 3 years.

**20%**



Using CRM in insurance brokerage will allow a **20%** increase in Underwriters' productivity and **10%** increase in business developers' productivity (on average).

## OVERVIEW

Falcon, "CRM for Insurance Brokers" digital platform, enables you to balance the competing imperatives of financial performance and customer satisfaction. From customers and insurers entities management, to full sales and policy cycles management, and efficient customer service, Falcon covers it all.

The platform also allows you to manage your marketing operations in addition to full financial integration and follow up.

Learn from your data while reviewing Falcon's basic or ad hoc reports, BI dashboards and analytics for better strategic business decision-making.

## FEATURES

- Full automation of sales process
- Automated correspondence with providers
- Automated correspondence with prospects
- Increase operational efficiency and sales management
- 360 view of customers
- Claim management workflow
- Group policy management
- Taxation, advanced fees, commissions
- Financial and accounting management
- Marketing campaigns and leads segmentation
- Agents and producers analysis
- Activities, alerts and authorizations capabilities
- Secure and robust development platform
- Continuous enhancement & new releases