CRM FOR INSURANCE

an insurance digital solution by **BSynchro**

One of the biggest challenges that the insurance industry faces today boils down to a simple task: the ability to generate an accurate and on-time proposal. As simple as it sounds, the times a broker highlighted significant delays in receiving proposals are countless. When was the last time your in-house sales missed on a renewal or your underwriting authorities have been breached? Brokers are your best customers; empower them with SQUID to avoid undesired risks.

On Operation

Tasks management dashboard with automatic notifications	Productive and efficient tool for risk decision	Lead management tool for your sales force	Activity planning tool for your digital distributors	Improve management visibility and decision taking

On Collaboration

Unified web portal for all insurance parties	Keep all stakeholders up to date with latest actions	Configure underwriting authority matrix across your organization	Timeline and status track on Quote management	Detection of similar request for quotation from all channels

On Analysis

Accountability and production monitoring tool	Analytical dashboard on Sales, production and efficiency	Exporting customized reports based on dynamic parameters	Tracking activities of all sales channels, brokers, in house and agent

OVERVIEW

With built-in and customized workflows tailored to Industry standards, Squid "CRM for insurance" works on improving your organization's efficiency and productivity. "SQUID" will empower your Brokers, Agencies, In-House sales, and Underwriters with a task management portal and activity tracking tool to collaborate efficiently, expedite communications, speed up decisions, and provide your sales force with an activity planning tool.

FEATURES

- Tasks management dashboard
- Opportunity and lead management
- Sales force activity planning
- 360 view of customer portfolio
- Authorization of Matrix customization
- Activity timeline history
- Similar quotation detection
- Document management
- Accountability & productivity monitoring
- Customized analytical dashboards