

# WaveAccess Dynamics 365 CRM Solution for Finance and Insurance

Process selection

Reception	Cooperation	Information Request	Sales
Prolongation	Delivery	Contract support	Personal Account Support
Losses	Quality control	Loyalty programs	Other

Run process Save Cancel

**Solution:** Unified workplace for financial and insurance companies, an omnichannel business app interface with automated and integrated business processes with Dynamics 365 CRM as a core system.

## Features

### — Customized insurance products and solutions:

- Insurance contracts
- Loss calculation
- Insurance packages sales
- B2B Insurance products
- Claim management
- Loyalty programs
- Contracts prolongation

### — Single window for all customer interactions

### — Task ranking: the incoming requests are processed and distributed according to agents' workload

### — Production calendar: employee work schedule and time tracking

### — Meeting scheduler.

- employees availability
- meeting rooms booking

### — Real-time Outlook synchronization

### — ERP Integration for full synchronization of financial activity

### — Integration with Telephone system

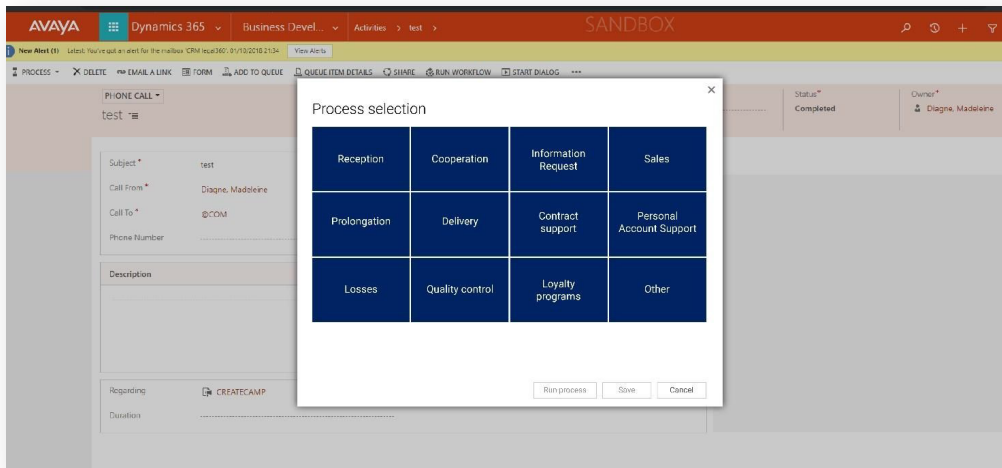
- one-click calls right from CRM Interface
- incoming call popups the CRM contact card so the agent can have immediate insights about the caller
- if the number is unknown, CRM automatically creates a new customer card
- call history and a link to an audio recording are automatically saved and available for further use

### — Knowledge Database right in CRM

### — Delivery system integration

## Our solution value:

- **Short time-to- market** (around 3 months, depending on the quantity of integrations)
- **Industry specific** – customized for Insurance and Finance, proven by Enterprise customers
- One vertical solution for employees, partners, clients and management board
- Total **transparency** of all communications with customers
- Every specialist's performance tracking
- **Revenue growth** based on improved targeting and more relevant offers thanks to customer history tracking
- Agents can focus on selling, not on formalities and processes



The solution is highly customizable and we will make it convenient for your particular business purposes.

Not sure exactly what you need? Let us lead you through a discovery session to help you accurately setup your project for success.

## About WaveAccess

**19**

years of delivering successful outcomes for customers

**350+**

talented & passionate professionals

**20+**

industry verticals from banking to healthcare

**4**

global R&D centres

**96%**

satisfaction index



2019 Partner of the Year  
Media & Communications Award  
2018 Partner of the Year  
Artificial Intelligence Award  
2017 Partner of the Year  
Business Analytics Award



Gold Application Development  
Silver DevOps  
Silver Cloud Platform  
Silver Datacenter

