



*anywhere*<sup>24</sup>  
>CREATING IMPACT

# *insurance relations*

>CREATING IMPACT ON INSURANCE MANAGEMENT

*Innovative insurance management with Dynamics 365 / xRM*





# Insurance Relations

## Innovative insurance management with Dynamics 365 /xRM

To be successful in the global insurance market companies need to work as a part of an international network and have to be leading edge in key areas.

Efficiency plays an important and growing role to stay ahead. Insurance companies and brokers are under pressure to optimize their processes to be ready for the new demands in an interconnected world.

### Adequate evaluation of risks

With growing cost pressure and globalization it is getting more and more complex to assess risks and opportunities by the respective risk and insurance departments. However, risk management is gaining significance as tool for strategic and operative corporate management.

With Insurance Relations for Dynamics 365, Anywhere.24 is making a powerful solution available to insurance companies and brokers. Insurance Relations will noticeably increase the effectiveness and efficiency of business processes – and thus significantly push companies ahead.

### Customer management in insurance sales

With Insurance Relations for Dynamics 365, Anywhere.24 is offering a proven vertical solution – with innovative top of the edge features. These include effective tools for sales, marketing and service: from campaign management, target-group-specific client profiles and comprehensive reports to perfect integration in Microsoft Office and Outlook. The goal is a better service for customers with lower sales cost at the same time.

### Corporate Insurance

Insurance Relations for Dynamics 365 procures a sophisticated solution for the challenging tasks for business units of insurance corporations. The solution encompasses risk assessment, visualizing corporate structures, contract management, compliance and governance management and much more.



A photograph of three business professionals (two men and one woman) sitting in a modern office environment with large windows. They are engaged in a discussion. The woman is on the left, wearing a dark blazer and patterned trousers. The man in the center is wearing a blue blazer and glasses. The man on the right is wearing a dark blazer and is gesturing with his hands. They are sitting in white armchairs around a small glass table. The background shows a bright, modern office with large windows and a view of a city.

# Sales Management

## Powerful tools for insurers and brokers

The insurance market is highly competitive. It is becoming increasingly complex for insurance companies to ensure and develop long-term company success. Efficient and effective marketing is vital in the competition for clients. The structured and professional management of customer relationships is the best basis for success – irrespective of the size of the sales unit. In this way clients can be retained long-term, relationships to existing clients deepened and new clients won.

With Insurance Relations for Dynamics 365, Anywhere.24 is offering a system that is optimally geared to customer management in insurance sales.

### Sales and marketing

- Central, direct access to all existing customer information by all authorized staff
- Campaign management for planning, execution and performance management of marketing activities as well as product and branch-specific analyses
- Central knowledge database for all employees
- Customizable email templates and documents with the Microsoft Word mail merge function

### Customer profile

- Creation of target profiles for specific market segments to actively support sales efforts
- Automatic comparison of the current status with customer target profiles
- Automatically generated sales sales opportunities derived from the targeted / actual status of customer needs

### Contract

- Managing branch keys and products for monitoring and analyzing sales processes
- Immediate linking of activities, documents and relevant information to contracts

### Claim and loss management

- Direct, central access to the claim and loss management with comprehensive information on claims, damages, contracts and customers
- The manual work required is reduced through linkage of the claim and loss management system via interfaces
- Direct categorization of activities, documents and other informations

### Evaluation / Reporting

- Standardized comprehensive reports to manage the sales pipeline, opportunities, segments / products, staff and competitors
- Advanced search capabilities as well as customizable, recurring queries and evaluations
- Integration / interfaces
- High user acceptance through native integration in Microsoft Office and Outlook
- The CRM client for Microsoft Outlook makes data available offline and in mobile form
- Optimal integration in the existing IT environment through established Microsoft technology and consistent use of standards



# Corporate Insurance

## Solutions for international risk & insurance management

Risk & insurance departments of companies that are active worldwide face growing challenges: on the one hand high-quality, powerful and at the same time economical insurance solutions must be provided, and on the other hand the available risk capital must be utilized in an optimally strategic way.

Insurance Relations for Microsoft Dynamics 365 supports the specific requirements of corporate risk & insurance management. The solution also portrays complex concern structures, frequently with a multitude of national and international companies, in a clear way. Insurance Relations is tailored to international networks and global communication pathways.

Complex interlinkages and processes are shown in a clear way for all persons involved. All existing information and documentation is available to the organizational structures at every workplace.

### Corporate structures & networks

- Visualization of complex structures: company hierarchies and locations, collaboration networks among insurers, brokers and service partners etc.
- Linking all information and files related to a process

### Complete risk information

- Collection and recording of risk information and documents according to the individual organizational structure
- Collection of risk information according to company and location
- Systematic analysis of worldwide risks

### Liability and insurance

- Overview of the risk situation of individual companies and the whole corporation
- Substantiated basis for a decision on whether a company itself is liable or whether it should be insured
- Organization of group charges, control of claim and loss processes
- Documentation according to corporate guidelines

### Target groups

- Risk and insurance departments
- Company brokers / in-house brokers
- Broker for industrial insurances
- Industrial insurers
- Utility and transportation services



### Maximum use of competition

- Making benefit from competitors worldwide based on a high quality of information
- Electronic information and evaluation: requests to insurance companies can be made quickly and in high volumes
- Reduced workload for the annual renewals

### Effective contract management

- Worldwide management of contracts and insurance programs
- Processing of differing clauses per company

### Claim and loss processes

- Claim and loss analysis for insured and uninsured risks
- Possibility of the import of external claim and loss data
- Additional processing of third party claims

### Total cost of risk

- Overview of the total cost of risk through evaluation of risk information, premium expenses and claim expenses
- Optimal prerequisites for effective risk control
- Excellent service for clients

### Mobile working

- Mobile working online and offline
- Secure hosting
- Choice of working within the corporate network / internet, depending on the internal IT concept

### Compliance

- High transparency and traceability of activities
- Future-proof platform with Microsoft technology
- An ideal basis to fulfill compliance requirements





# Creating Impact

## Xtended benefits with xRM

Maintaining customer relationships, managing business processes, collecting key performance indicators and company-wide controlling – Anywhere.24 makes it possible. As the specialist for xRM solutions, Anywhere.24 is recognized as a valued advisor and implementation partner for extended relationship management (xRM) solutions in German-speaking countries.

### In focus: xRM

The Anywhere.24 group of companies designs individual and customer-specific xRM solutions for a whole range of industries and areas of application – all of which have a common denominator: they want to increase efficiency and create a strategic competitive edge for their customers.

The Anywhere.24 company philosophy follows the guiding principle of "Creating Impact". By this we mean achieving a significant increase in efficiency as well as securing a strategic competitive advantage for your company. With Anywhere.24 you benefit from extensive expertise in technology and management consultancy.

### Three business areas

The Anywhere.24 company group consists of three divisions working in synergy: Anywhere.24 Advisory, Anywhere.24 and Anywhere.24 Technologies, all of whom work cooperatively or independently according to the requirements of the project. That means the customer always receives the optimal combination of many years of management consultation and field-proven technological expertise. A single point of contact will accompany the customer from planning through implementation up to service and support.





# High-quality work

## Quality management for customer projects

Anywhere.24 has developed their own phase model for their customers based on many years of experience, know-how and best practices according to CMMI®.

Potential risks are addressed early by means of a reasonable number of iterations and early prototyping. With its transparent project management and targeted solutions, Anywhere.24 is in the position of being able to flexibly and efficiently implement all requirements at any time.

The needs of the customer as well as the lean system installation are our top priority. Also the early enablement of the user and the administrators are a significant part of the concept.

We use the Capability Maturity Model® Integration (CMMI), an internationally recognised business improvement model. It supports customers in achieving time, cost and quality targets in the best possible way. Anywhere.24 uses CMMI® both to facilitate internal improvements as well as for process consultation and benchmarking for their customers.

### The reliable partner

With many years of experience in complex, consultation-intensive xRM and supplier relationship management projects in ERP and CRM systems, Anywhere.24 has acquired extensive skills in process design and the introduction of key performance indicators.



**CMMI Institute Partner**

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