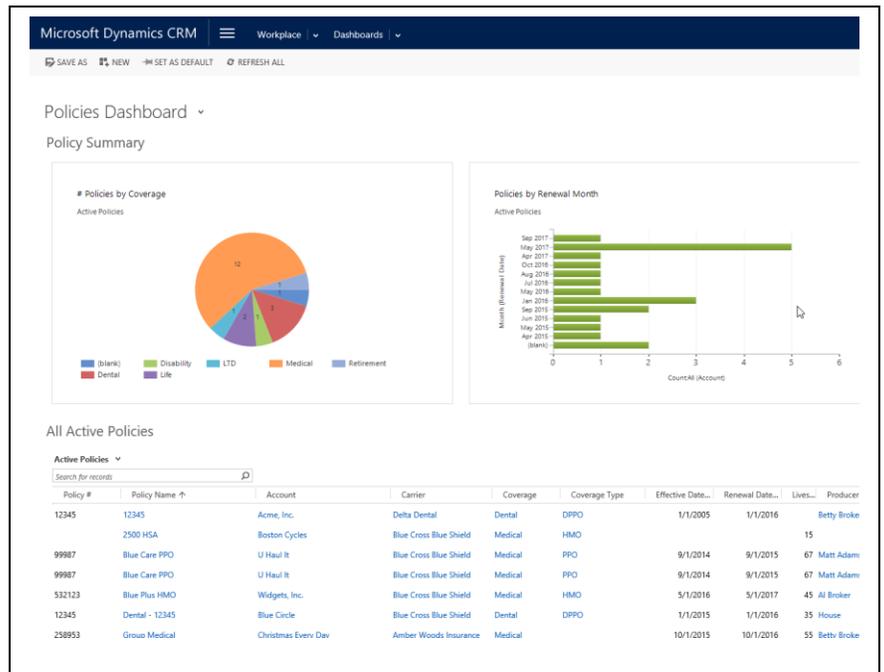## BENEFITS

- **Increase operational efficiency.**
  Automate repetitive manual tasks and eliminate duplicate data re-entry by creating one central source for all policy holder information.

- **Improve customer loyalty.** Show your customers you know and care about their needs. Track client contacts centrally, create nurture campaigns to strengthen ties, and identify the right products and services to meet each client's specific needs.

- **Acquire new business.** Conduct integrated, multichannel marketing campaigns and track response and close rates. Focus on the most effective activities and give producers specific and timely follow-through steps with automated workflows.

- **Optimize policy renewals and up-sell opportunities.** Comprehensive workflows, analytics, and case management capabilities help ensure that every opportunity is easily tracked through its entire life cycle.

- **Improve service.** Empower all producers and service staff with the tools and information they need to efficiently and profitably deliver high-quality, personalized service during all interactions, across all channels.

- **Monitor agency performance.** Track key performance indicators across the agency through rich dashboards and reports.

- **Extend Microsoft Office.** Microsoft Dynamics 365 integrates with Outlook, Excel, Word and other existing Microsoft products and technologies– so it is easy, convenient, and familiar for quick user adoption and a fast return on your investment.

Drive agency productivity, increase profits and reduce costs, and deliver exceptional service as your client's trusted advisor.

Employee Benefit Brokers are increasingly turning to a customer-centric approach that helps them reduce operating costs while better equipping their producers and service representatives to improve the customer experience. A well-defined and executed customer relationship management (CRM) strategy, with Microsoft Dynamics 365 at its center, helps employee benefit brokers focus on key imperatives that impact costs, new business and renewal rates.

A powerful CRM platform. The familiar Microsoft Dynamics 365 interface makes it easy for producers and service representatives to do their best work with minimal training. Ease of integration with Microsoft products and technologies helps expand the reach of CRM information to teams and executive decision makers.

FEATURES	BENEFITS
Centralized Policy Holder Information	Integrate sales, marketing, and service functions, allowing your producers and service representatives to access and share complete information across departments, product lines, channels or intermediaries. Each member of the client service team has access to information that includes customer profile and history, relationships, and service records, increasing client confidence and improving office productivity. Information on prospective accounts is captured, so even if they don't accept the initial quote and move to policy origination, you can keep them as a lead and contact them again.
Producer Productivity	Collect and share deeper levels of customer knowledge to improve service levels at key points of the client relationship, such as during renewal, and to enable client-facing professionals to proactively schedule timely follow activities.
Workflow Automation	Automated alerts and customizable workflow can help your agency reduce the time required to resolve inquiries. Automated workflow streamlines processes across functional areas, such as automating policy renewals, building stewardship reports, managing RFPs or simplifying the commission tracking process.
Policy Management	Quickly view policy information from a global or client perspective with intuitive drill down capabilities into rates and plan data information.
RFP	One button export of carrier plan data to Microsoft Excel for quick plan comparisons for RFP creation.
Commission Tracking	Easily manage your agencies incoming carrier commissions and outgoing producer commission schedules in one system. Robust and flexible commission tracking allows for a variety of incoming commission schedules and outgoing producer splits. Automated importing of monthly commission statements provides quick and accurate reconciliation of incoming and outgoing commission payments. On demand reports and dashboards provide visibility into actual vs. expected commissions, commission payments by producer, carrier or client, and more.
Business Intelligence	Powerful dashboards and reports give your agency visibility into agency / producer productivity, case management, expected vs. actual commissions, new business success, and more.
Activity Management	Quickly capture call notes and schedule follow up activities for efficient and timely follow up. Efficient activity management increases revenue opportunity, accelerates lead conversion rates and adopts a proactive approach to client communication. Stewardship reports also help you quantify and articulate the value your agency provides to each client, and provides insight into which service professionals are providing service to your clients.
Marketing	Identify target demographics and develop appropriate, targeted marketing campaigns and client communications. Identify connections between primary policy holders and family members. Automated alerts and customizable workflow can help brokers improve service at renewal, maximize opportunities to cross-sell products and services, manage policy renewals, and reduce the time required to solve customer inquiries.

Service Case Management	Efficiently manage support cases by issue category, policy, client or insured member, carrier and producer for a real-time global view of all service issues with each service issues' details.
Lead Management	Automate your lead management and sales qualification process in one central location. Convert incoming leads from email messages and use guided dialogues to streamline the qualification process.
Compliance Management	Incorporate regulatory and compliance changes to help ensure products and policies are being sold and managed in full compliance. Proactively communicate changes in health care legislation and identify new revenue streams as your clients trusted advisor.
Document Management	Track documents against any record in Microsoft Dynamics 365 for simple document management or employ native integration with Microsoft SharePoint for more robust document management capabilities.
Familiar Look and Feel	Deliver customer relationship management tools and capabilities in a familiar, easy-to-use interface, enabling your agency to deliver fast, effective service that builds loyalty and satisfaction. Enhance communications using easy-to-use and well know desktop tools, such as Microsoft Office Outlook, Excel and Word, helping to increase user uptake and lower cost of learning.
Fast, Flexible, and Easy to Deploy	Get up and running quickly using Microsoft Dynamics 365 as an online solution in the Microsoft Cloud. With point and click customization of data management, workflow, user experience, access and security, analytics, and reporting, BenefitsBridge for Microsoft Dynamics 365 is flexible and will scale with your agency as it grows and changes.

Crowe Horwath.

Microsoft Dynamics 365

About Crowe

At Crowe, our mission is to help any organization streamline their business operations and increase business success with the Microsoft Dynamics 365 platform.

Our experience is delivering CRM project success

We have been implementing CRM technology from the inception of contact management applications through the evolution to sales force automation and ultimately customer relationship management (CRM) systems. Our logical CRM project implementation methodology is proven and is focused on project success.

We know Microsoft Dynamics 365

At Crowe, we are focused on Microsoft Dynamics 365 and the Microsoft technology platform. Our involvement with Microsoft CRM dates back to the first release in 2003 and continues through its evolution into the market-leading CRM platform it is today. The flexibility of the platform, familiar user interface, interoperability with the Microsoft Office platform, including Outlook, and its top-flight functionality make it a smart investment choice for any organization looking to implement a CRM technology strategy.

Focused on your success

Crowe strengths are our people and their personal commitment to each customer engagement. Our logical approach, the quality of our effort, and the seriousness and professionalism we bring to the table have been the keys to our accomplishments. We measure our success by our customers' success.

For more information about **BenefitsBridge for Microsoft Dynamics 365**, contact us @ 877-600-2253 or visit www.crowe.com/crm/benefitsbridge