

# Engage for Insurance

CRM Built Specifically for Insurance, Designed by Industry Experts, Powered by Microsoft Dynamics 365



## Complete in a demanding industry by focusing on customer service

Hitachi Solutions' Engage for Insurance provides insurers with a practical solution to effectively manage and foster profitable relationships across agencies, customers, brokers, and other partners. Our solution enables you to focus on all aspects of the insurance business and the customer lifecycle, from relationship and engagement management to business development.

We give you access to the information you need through an intuitive user interface so you can focus on finding, winning, and maintaining profitable client relationships. We understand that managing the customer relationship is a team process. That's why we provide collaborative tools to help you coordinate between teams with a tailored experiences based on each user's job role.

## Engage for Insurance enables insurers to:

- Deliver personalized, contextual experiences for any job role including agents, service reps, underwriters, and producers
- Access real-time information when and where you need it on any device
- Create tailored processes for any engagement type including sales, retention, and service
- Provide customized dashboards that provide visibility into performance and activity

## Industry Specific Modules

With five out-of-the-box insurance specific modules, Engage for Insurance enables insurers to focus on all aspects of their insurance business and the customer lifecycle, from relationship and engagement management to business development.

### **Distribution Relationship Module (DRM)**

Make distributor relationship management a competitive differentiator with a comprehensive platform that gives you real visibility into distributor performance.

- **Performance Management**  
Get a clear understanding of distributor performance including hit ratios, loss ratios, net promoter scores, agency surveys, and more
- **Agency Enablement**  
Maximize the value of your agency relationships by engaging the right agency at the right time with planning tools, interaction journals, and an agency portal

- **Analytics and Reporting**

Drill down into your business data and gain deeper insights into agency segmentation, policy management, and performance of your products

- **Licensing Management**

Manage agencies and agent licenses proactively with tools that include automatic alerts for license expiration and automated license management tasks



## **Risk Management Module**

Automate and organize risk assessment related activities including pre-quote surveys, loss prevention surveys, and claims review visits.

- **Pre-Quote Surveys**

Capture and manage all the pre-quote information to accurately assess risks and to price accordingly

- **Claims Review Visits**

Maximize the value of your agency relationships by engaging the right agency at the right time with planing tools, interaction journals, and an agency portal

- **Workflow Automation**

Streamlining activities through autonotifications for activities such as Claims Reviews, Agency Visits, and other activities that are critical to the insurance lifecycle

- **Analytics and Reporting**

Dashboard reporting to promote visibility and accountability of key performance indicators throughout the organization



## **Direct Channel Management (DCM)**

Give sales, marketing, and service people the support they need to build a robust and efficient direct channel. Track every detail from lead to premium and more effectively monitor the ROI of marketing campaigns.

- **Performance Management**

Gain unprecedented visibility into direct channel performance to better manage metrics like hit ratios, loss ratios, and customer satisfaction

- **Member and Policy Lifecycle Management**

Manage the member and policy lifecycle from prospect to issuance and beyond

- **Underwriting Workload Management**

Better track and manage applications and submissions as they move through the department

- **Sales Management**

Transform sales with streamlined management of leads and prospects by territory and product line

- **Member Management**

Gain a 360-degree view of members and policies so you can provide superior customer experiences to your members



## **Producer Productivity Suite**

Unleash producer productivity by giving them access to customer information, data analysis and reporting, and activity management whether on the desktop or through a smartphone or tablet.

- **Producer Portal**

Give brokers or agencies one portal to access the information and guidance they need, including self-help capabilities

- **Office Productivity**

Get alerts, renew policies, manage communications, communicate with members, and view performance dashboards using familiar Microsoft Office

- **Mobility**  
Empower agents with a platform for mobile productivity and onsite sales that gives them access to customer information and sales collateral

## **Policy Integration Toolbox**

Unite service applications, best practices, and telephony enablement in a consolidated agent desktop that helps speed resolution and provide personalized service.

- **Integration Framework**  
Put member information from multiple back-end systems into one view including policy, claims, and billing
- **AgentDesk Search**  
Easily search across agencies or members to quickly identify each caller and provide details without hunting around for the information you need
- **Telephony Integration**  
Automatically pop up customer information in the context of each call so that the agent already has the information they need when the call starts
- **Automated Activity Capture**  
Track how customer service representatives navigate the system as they work and use that information to gain insight into your service processes

## **Why Hitachi Solutions**

We offer deep industry expertise combined with decades of experience providing high-value solutions that deliver rapid return on investment. Our approach is designed to give you a faster, lower-risk implementation and rapid adoption through proven best practices.

- It starts with core technologies built on Microsoft Dynamics 365 so you can get up and running quickly
- We extend that with our own industry modules that give you capabilities tailored to the needs of the banking industry
- Finally we deliver a customized solution to provide the best fit for your business so you can focus on your unique strengths, not on basic technology

### **GET STARTED. REQUEST A CUSTOMIZED DEMO.**

Interested in learning more about Engage for Insurance? Get a customized demo to see how you can re-invent your business solutions.



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