PensionSoft

Insurance Management on Dynamics 365

Microsoft | Dynamics 365

GENBIL SOFTWARE

What is PensionSoft ?

PensionSoft is Dynamics 365 Sales and Customer Service

Extension for Pension Industry

Through this solution, you can manage all your sales and customer service processes on a one single platform. PensionSoft integrates with other core systems which makes you more flexible than before. PensionSoft has been created for the use of all Pension Insurance organizations that have Sales and Customer Service experts/directors.

Potential Customer Management

Campaign Management

Sales Increase

Opportunity Management

Customer Service

Customer Management Integration and Satisfaction

Business Process Management

Objective Management System

Performance Evaluation and Reporting

Real-Time Core Operations, Micro Services, Core System Integrations

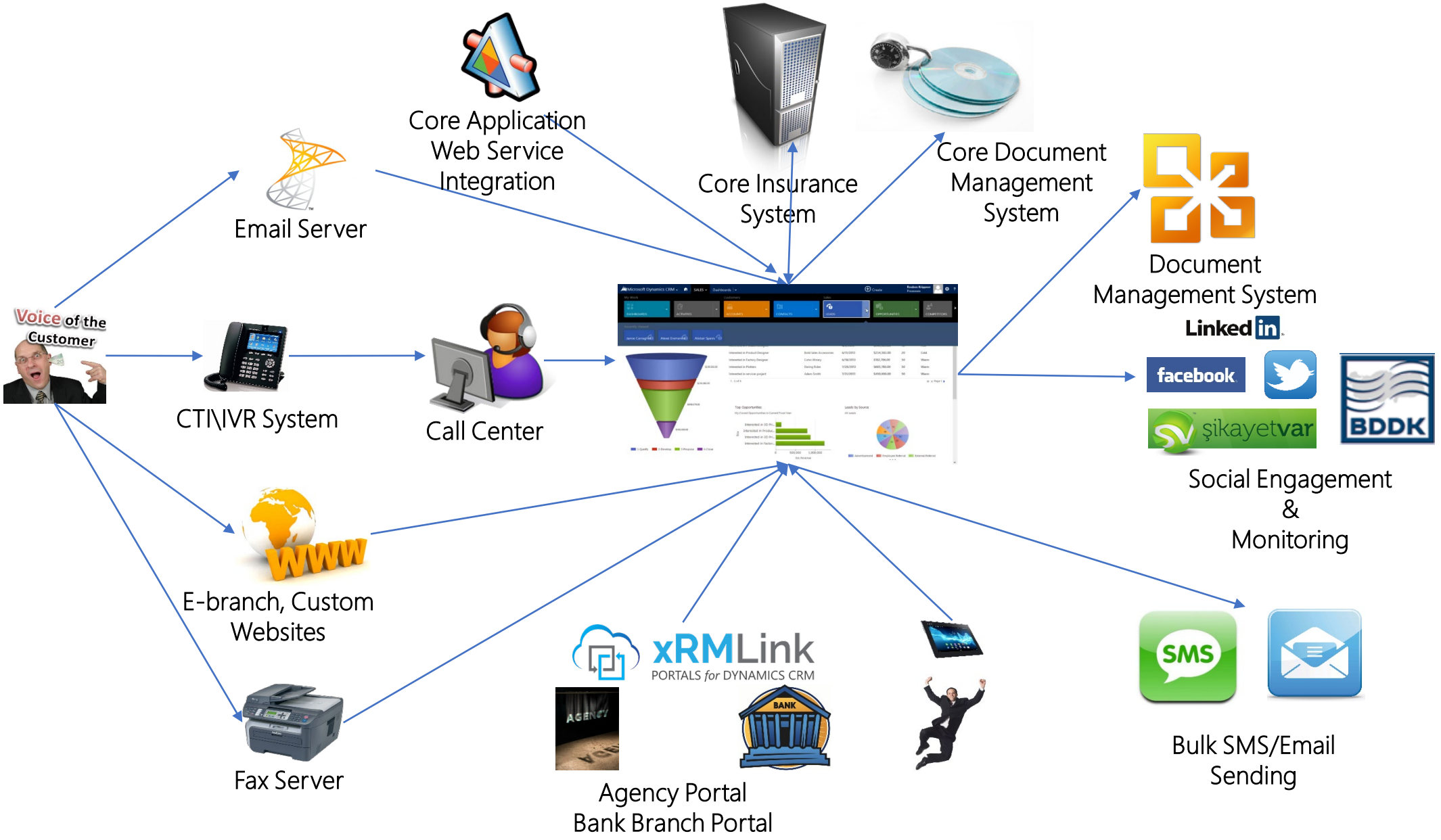
Agency/Bank Branch Portal
(Desktop + Mobile)

PensionSoft
Insurance Management on Dynamics 365

CDSLink
Portals *for* Common Data Service

Microsoft | Dynamics 365 Framework

General Architecture



User Groups and Roles

Customer Relations, Operation, Fund Directorate

Marketing, Product Management

Agencies and Agencies Directorate, Doctor, Actuary

Retail and Corporate Sales Units, Field Sales Team, Bank Employees

Marketing and Sales Management

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Pool Management
Campaign Management
Interviews
Sales Process
Gaining Customer
Customer Promotion Process
Marketing and Sales Process

Marketing and Sales Process

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Lead Pool → Central Distribution → Interviews → Offer Process → Gaining Customer

Pool Creation

- Landing Page
- E-Branch
- Incoming&Outgoing Call
- Email
- Chatbot
- SMS
- Social Media
- Insurance Investigation

Management and Distribution

- Pool Management
- Distribution Rules
- Priority Options
- Exclusion Rules
- Time Management
- Bank/Agency/Direct Sales Distribution
- Cross Sell Management
- Distribution History

Interviews

- Creating Call Rules
- SMS & Email Notifications
- Appointment Management
- Customer Contact History

Offer Process

- Document system integration and offer document creation and sending
- Offer Process Reminder
- Notifications & Interviews

Gaining Customer

- Creation Product with core system integrations
- Customer and lead matching
- Welcome/satisfaction/routine etc. customer call

Marketing and Sales Process

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Campaign Definitions → Marketing Lists → Interviews → Cross Sales → Campaign Responses

Campaign Definitions

- Campaign Duration Definition
- Selecting Campaign Type
- Award Data
- Marketing lists and campaign activity matching

Marketing Lists

- Company/individual customer/lead selection
- Static and dynamic list selection
- Creating External Marketing List
- One or more campaign matching

Campaign Interviews

- Creating phone call for related list
- Bulk SMS and Email Sending
- Proactive Campaign Offer(GetTopXOffer)

Cross Sales

- Creating cross-selling phone call for customer pool/suggest a campaign
- Product sales with scripting dialogue process

Campaign Responses

- Campaign Responses Reporting
- Campaign Response Call Rules Definition
- Re-call for call rules definitions

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Marketing and Sales Process

Private & VIP Customer Management

Blacklist Customer Management

Private & VIP Customer

- Private Customer Assignments
- Investment Advisor Assignments
- Distribution Rules Definitions
- Hiding/updating private fields by role and user
- Private Customer Segment Definition
- Risk Test and Level Information
- Creating Fund Bulletin/Main Comment Documents to the risk level
- View of customers only by assigned private customer and investment consultant

Blacklist Customer

- Blacklist Customer Assignments
- Blacklist customer alert screen for case/phone call/appointment
- Hiding/updating private fields by role and user

Churn/Segmentation Process

Churn/Segmentation Process

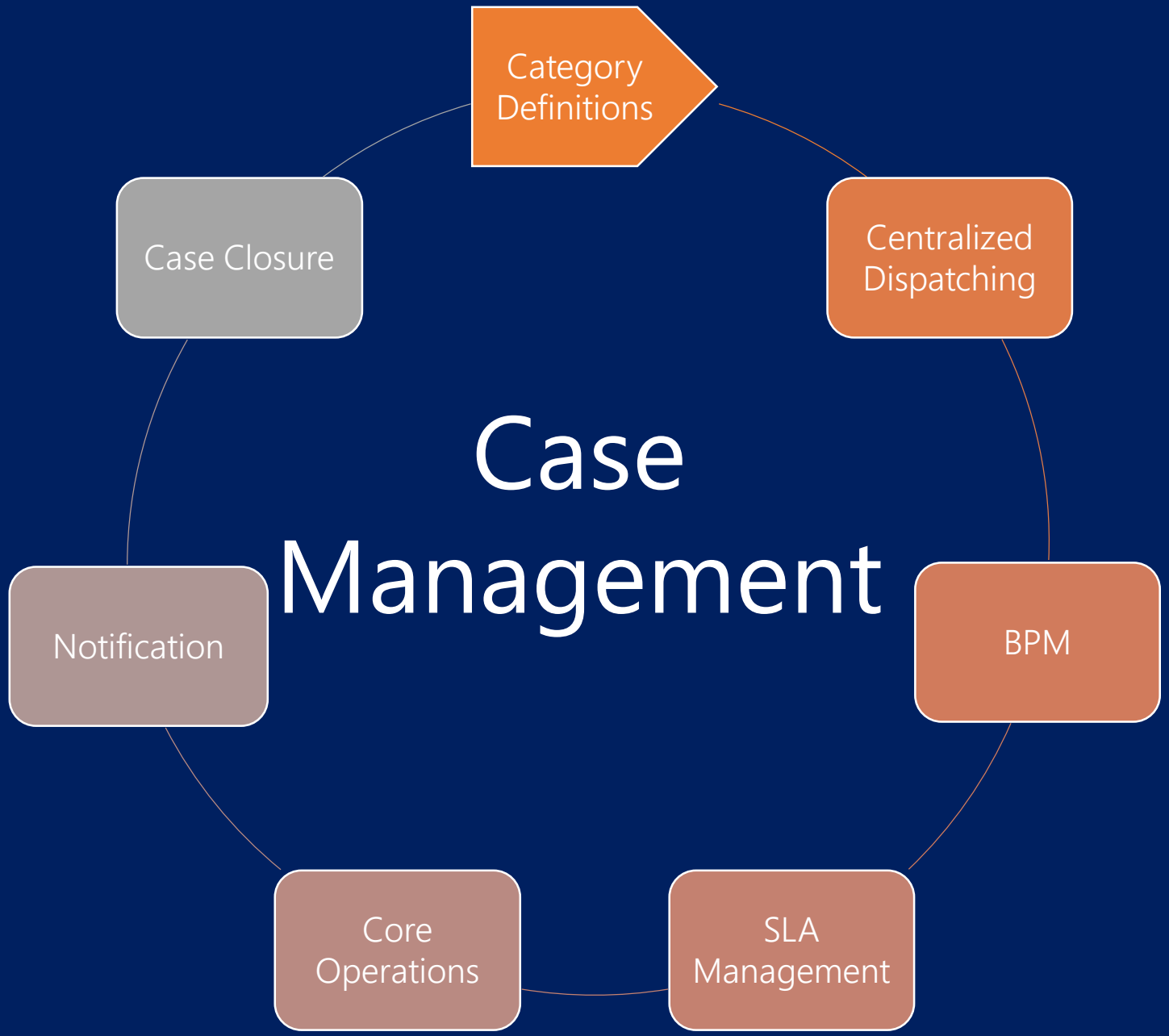
Churn Analysis

- Calculation of variables affecting Churn Value in CRM, such as count of persuaded retention cases in last 12 months, number of fund changes on last 6 months, Total Cumulation, number of open dues, Payment Type, Customer Age etc.
- Correlation analysis between variables and Churn status and defining variables short list
- Frequency, data skewness, average / median analysis of short listed variables and correction of data if necessary
- Binary regression analysis for churn status and short listed variables
- Calculation of churn value and groups and processing in BEE records
- Comparison of churn value and churn status with X month periods

Segmentation & Customer Analytics

- Analyze customers with multiple sets of segments based on financial approach, KP and investment size, age and demographic information
- Calculating family size of customers and using them as value set
- Automatic calculation of customer segments in monthly or specified periods
- Life club and hobby choices and segment adaptation study
- Organizing special action processes for customers and activity management in CRM system
- MIS Information: Total BES Fund, Active BES Count, Open Due Count, Using of Life Club, Categorical Production Details, Total Cumulation Amount After Cut off, Last Open Due Date

Customer Service Management


Category Definitions
Centralized Dispatching
BPM
SLA Management
Core Operations
Notification
Case Closure
Case Management

Case Management

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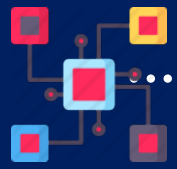
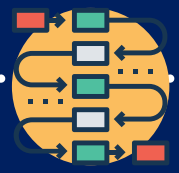
Centralized Dispatching → Genbil BPM → Queue Management → SLA Management

Centralized Dispatching



- Email and fax records
- Case creation/document processing/forwarding to another email using the index screen
- Complete email/fax and remove record from queue
- Index Log Reporting

Genbil BPM Process



- Process step definitions
- User/Team definitions for steps
- Positive/Negative/Cancel step matching
- Update Case Status(on hold/InProgress/resolved etc.)
- Case Reason/Result Definitions

Queue Management

- Manual distribution by authorized person
- Round Robin Algorithm
- Automatic distribution by the system
- Queue Priority management

Duration Management

- Step duration definition
- Single duration for multiple step definition
- Timeout notification
- Automatic step forward for timeout
- Time Reporting

Case Management

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Document Management → Core Operations → Notifications → Phone call & Appointment Management

Document Management

- Automatic step definition for document
- Integrate with document management systems and transfer documents to the core system and preview option

Core Operations

- Real-time Operation for special case
- Update information for core system
- Supplementary operations

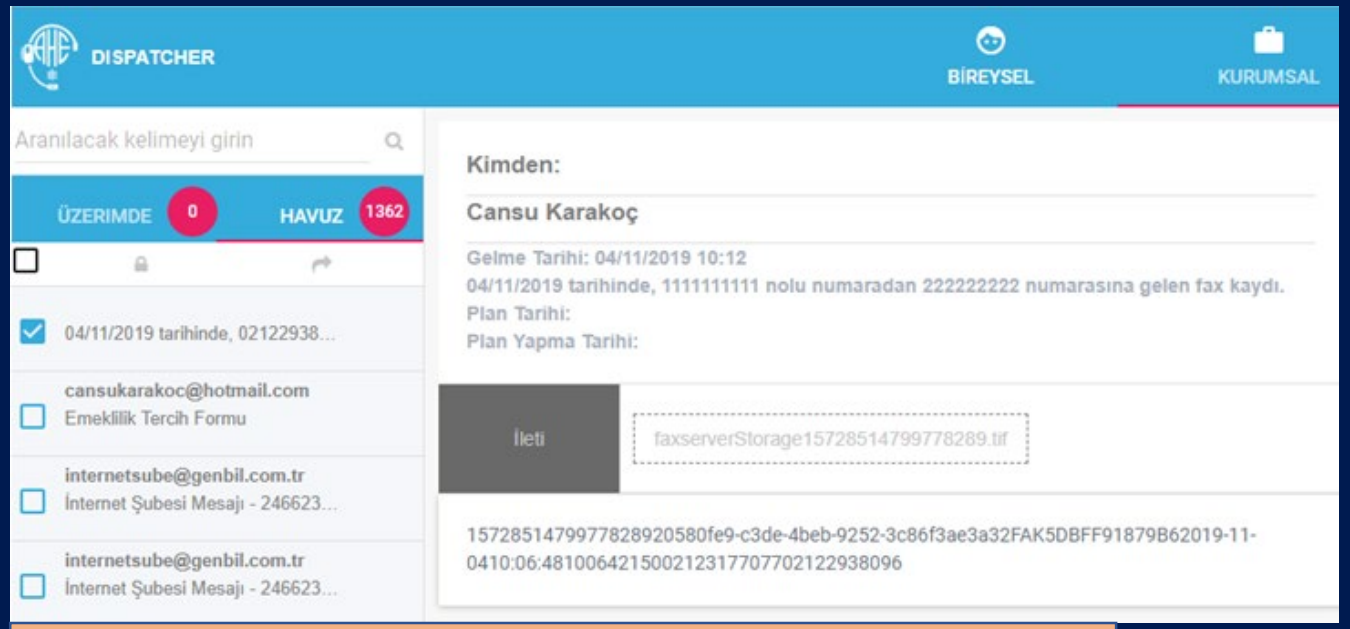
Notifications

- Case notification
- Notification definitions for step
- Manual SMS and email creation and sending
- Missing document notification

Phone call & Appointment Management

- Phone call and appointment definitions for step
- Activity result definitions
- Assignment of activities to person or team or queue
- Activity type definitions

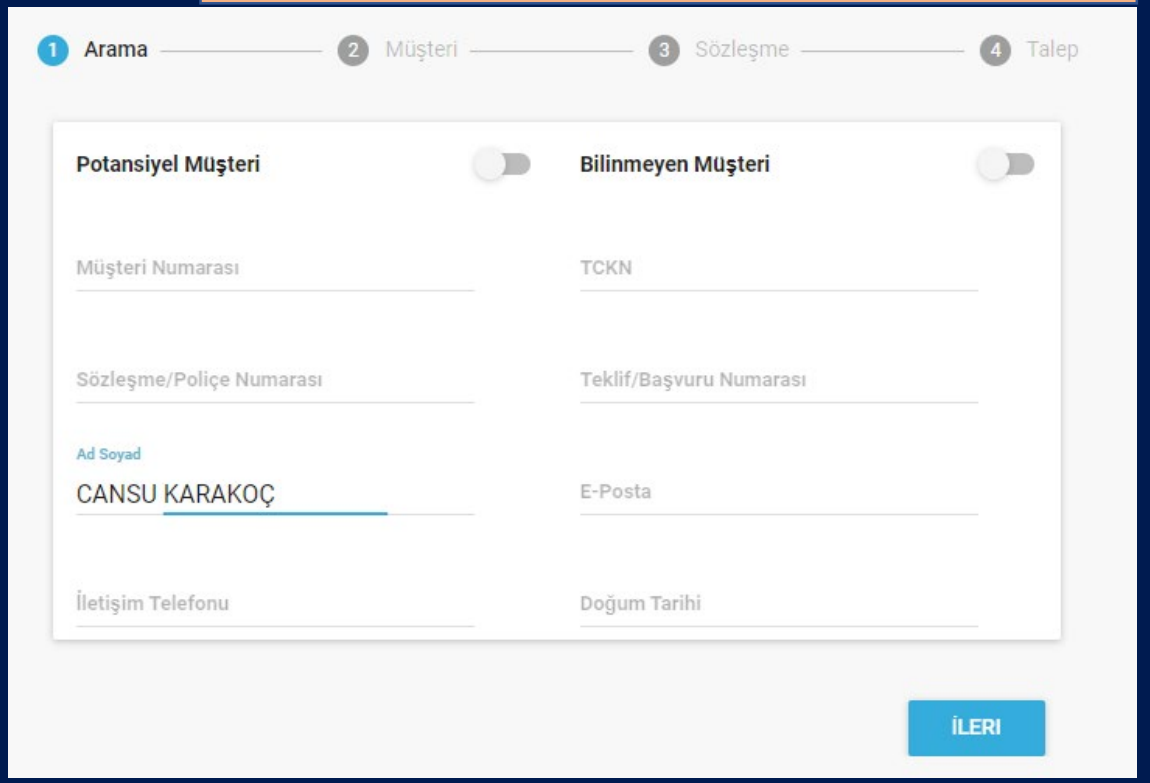
Centralize Dispatching



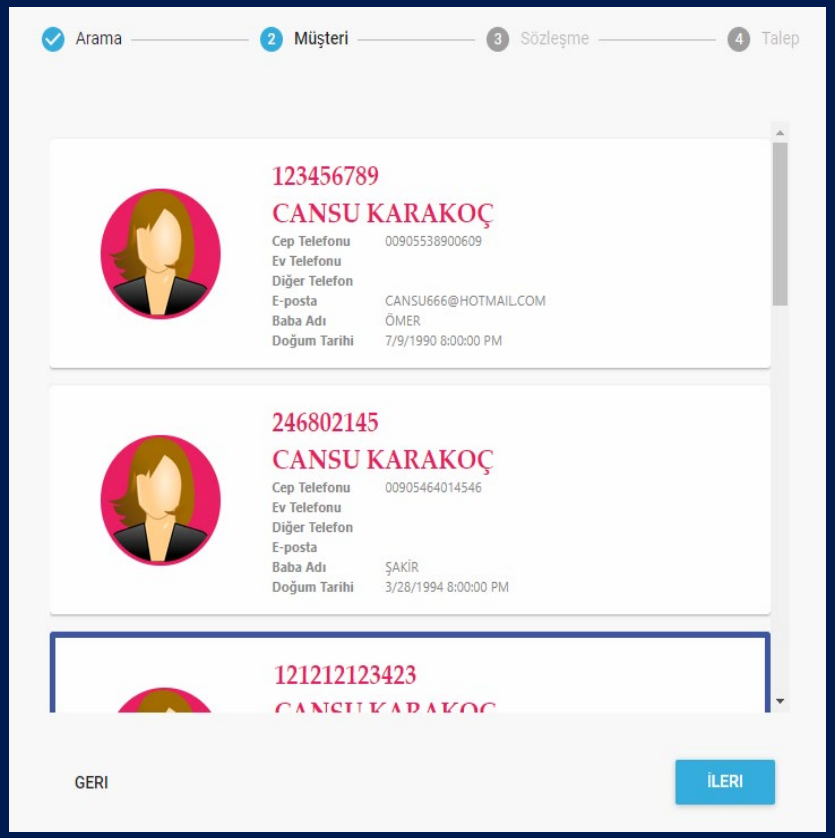
Instant customer search by customer name/government id/contract/policy number etc.

Genesys Web Engagement Integration

Letter, SMS, Email and Fax Type Support

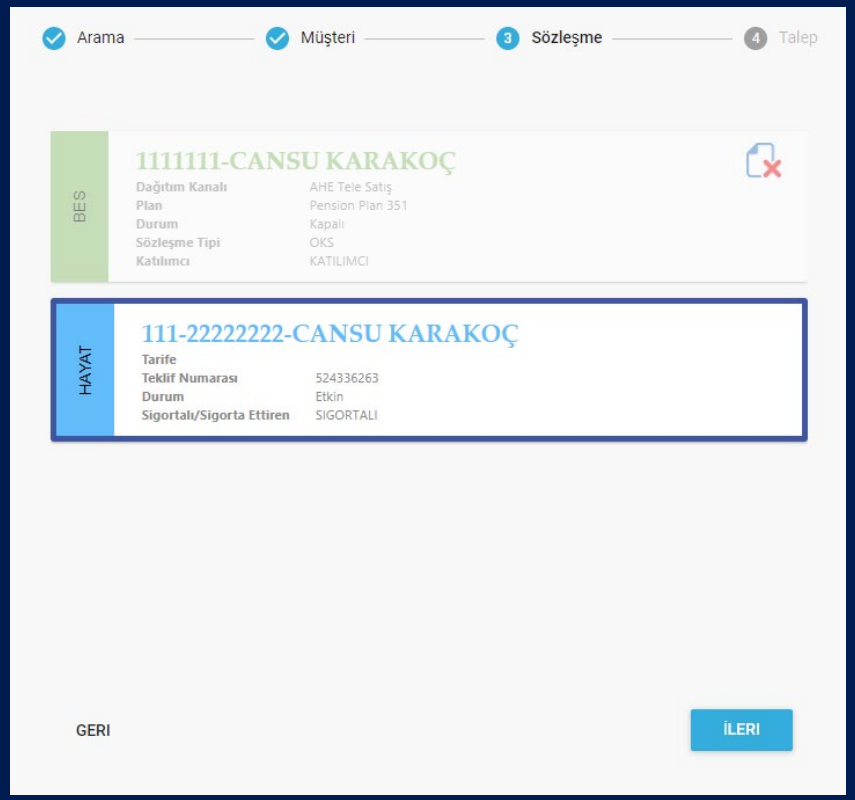


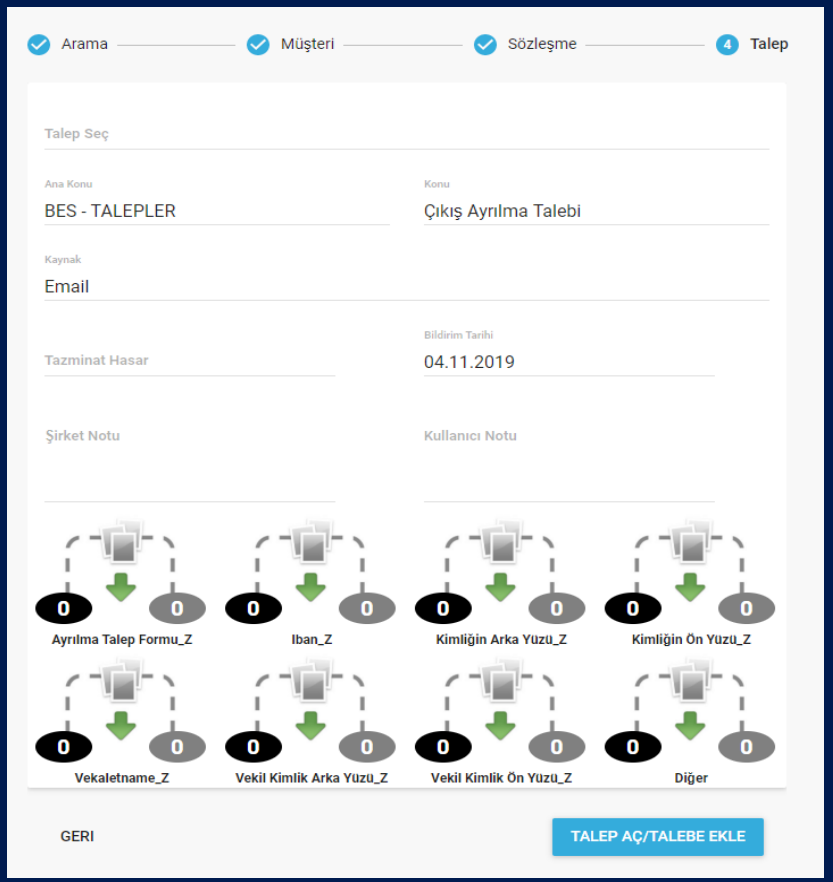
Centralize Dispatching



Select the correct customer

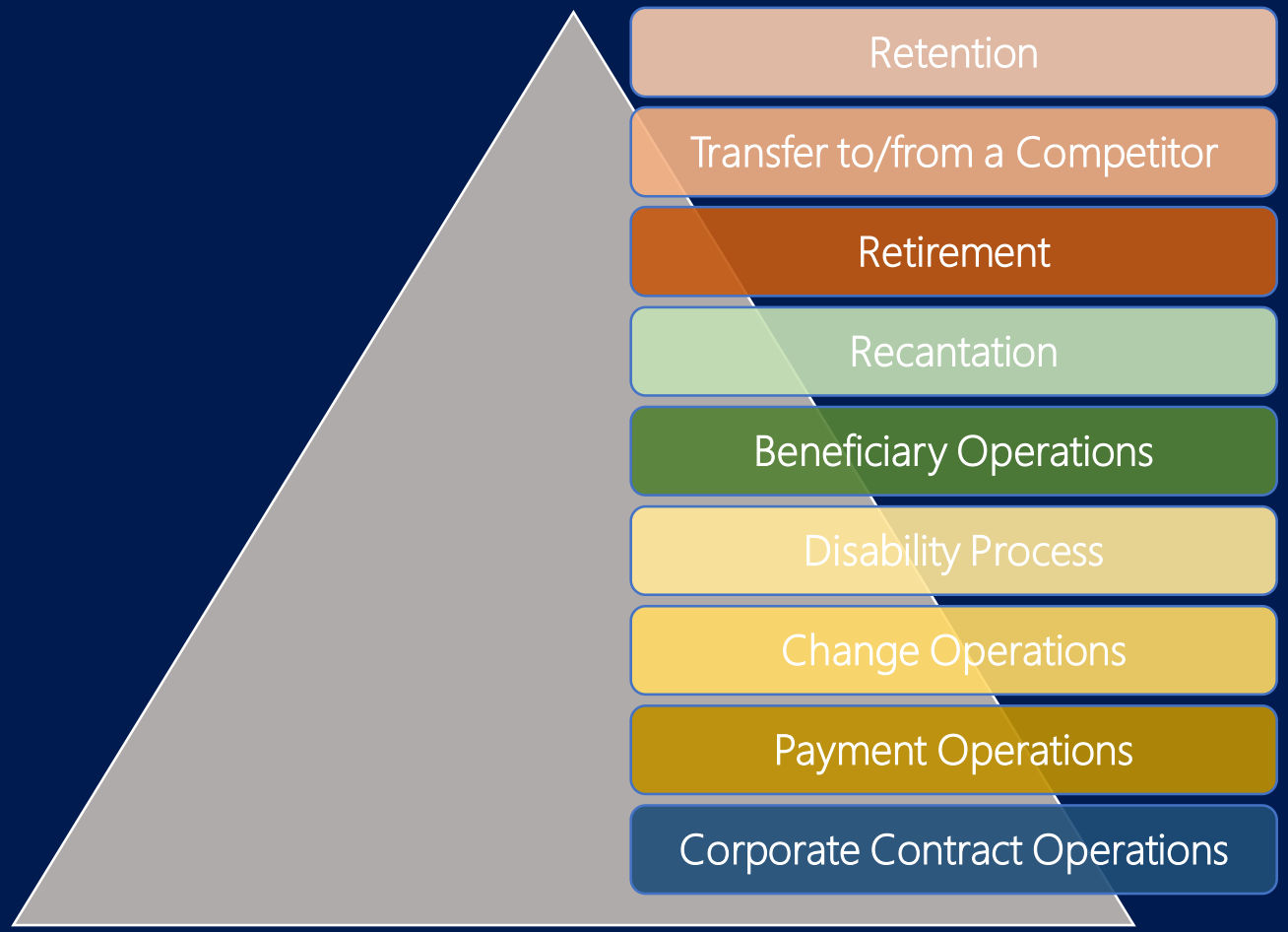
Select the correct customer's product





Select case type, document types and proceed.

Primary Pension Process



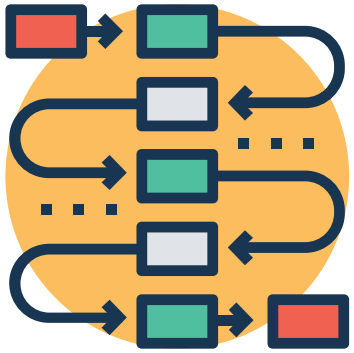
Customer Contact Examples

Call Types

- Welcome Call
- Retention Call
- Satisfaction Call
- Campaign Call
- Complementing Call
- Complaints and Information Call
- Callback Call

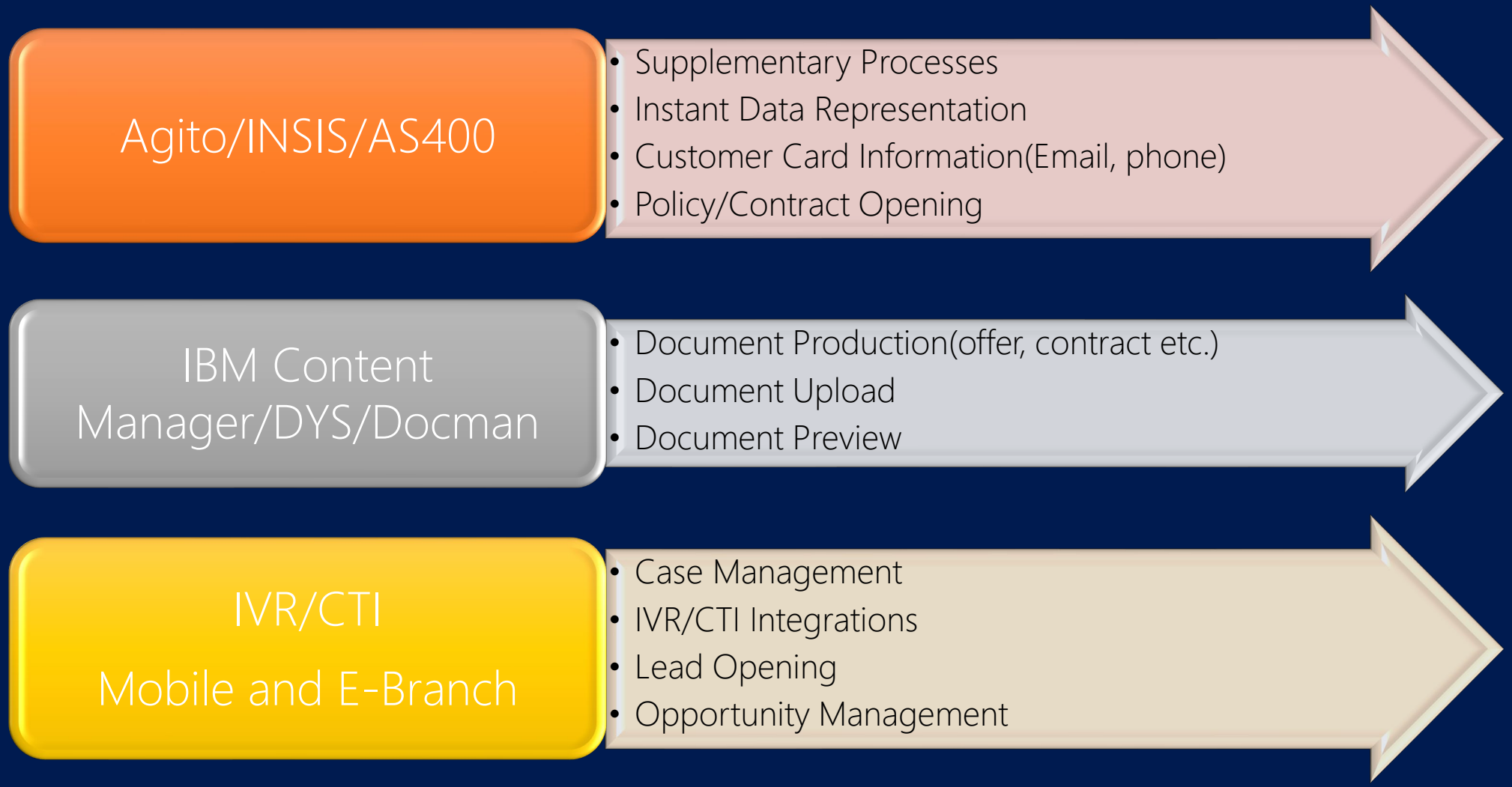
Scripting Types

- Welcome Process
- Contribution Amount/Payment Type etc. Changes
- Leaving Process
- Collection Process
- Complaint/Callback Process
- Other Inbound Process
- Sale and Private Customer Processes



Integrations

Integration Endpoints



Real-Time Operation Screens

- Contract Information
- Policy Information
- Fund Information
- Vesting Contract Information
- Damage Information
- Accrual Information
- Beneficiary Information
- Credit Card Information
- Collection Lists
- Supplementary Information
- Collection Reasons
- Payment Information
- Bank Information
- Account Information

Smart Message/
Euro.message

- SMS Sending
- Email Sending
- Campaign-based Sending
- Bulk Sending

ATOS/ClickDimensions
/Genesys/Webhelp
/TGB

- CTI Integration
- Authentication and Authorization by Government/Customer Number/Contract Number
- VIP and Blacklist Management and Control
- View of Call Information History

ClickDimensions SmartMessage global bilgi Webhelp euro.message GENESYS Atos GENBİL SOFTWARE

Some References

GENBİL | PensionSoft Insurance Management on Dynamics 365

About Us

GENBİL | PensionSoft Insurance Management on Dynamics 365

Established in 1998

Location

R&D Center Tübitak/MAM Gebze	Kozyatağı Istanbul	Portland/Oregon North America	Alpheratta, Georgia U.S.A.

Our Team

Hakan Parlak
Managing Partner
Business Development

+15 years of work experience
+30 project management

Özgür Genç, Phd
Managing Partner
Software Architecture

+15 years of work experience
+40 project management

Eugene Brownell
Managing Partner
North America Operations

+25 years of work experience
+50 project management

Microsoft Dynamics 365
Partner of the Year 2014

Gold Competency — Microsoft Gold Partner

Cloud Solutions Partner (Tier-1 CSP MEA)

Contact us for More Information

hparlak@genbil.com
(0532) 272 0771
(0216) 474 7092
linkedin.com/in/hparlak