

Accelerating the implementation of solutions for the insurance industry

A Comprehensive Industry Solution

Neudesic's InsureRM is an accelerator designed to help brokers manage everything from lead distribution to sales opportunities to customer portfolios. This comprehensive solution can be quickly deployed to divisions or across an entire company for better customer visibility. It is available for CRM Online 2011 (Cloud) or OnPremise in Microsoft Outlook, Web, or Mobile applications.

The solution's capabilities extend from "out of the box" relationship and communication management to the support of complex sales processes. With it, users are able to maintain current and comprehensive customer portfolios, improve referral management effectiveness, and leverage customer information for up-sell and cross-sell opportunities.

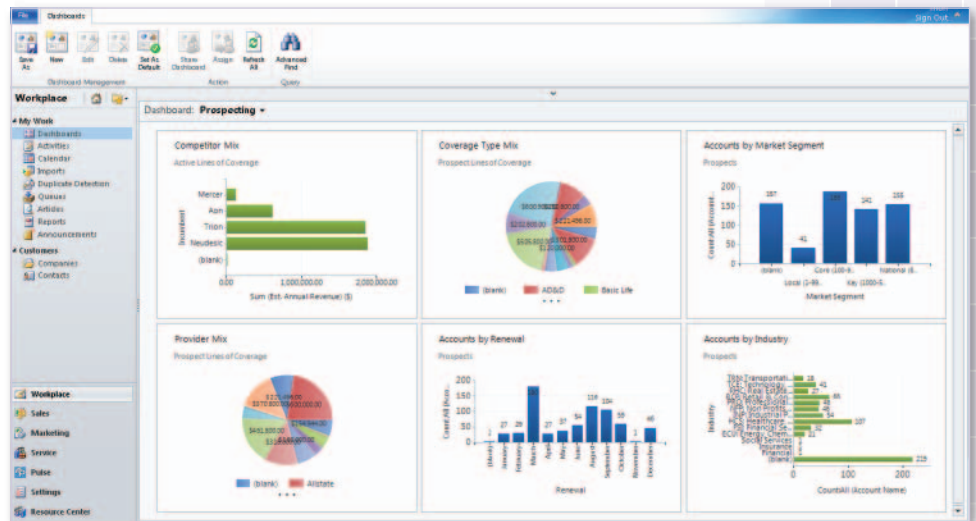
Lead Distribution & Opportunity Management

The Neudesic Sales Model provides a best practice process to help producers increase their top line revenue by offering automated support for the entire customer life cycle, from new leads and referrals to existing clients who have purchased multiple products. Through this process, sales teams can share and work with records based on account relationship or type of opportunity, and incentive compensation can be tracked according to specific opportunities, accounts or lines of coverage sold.

Custom Line of Coverage Tracking

Neudesic built line of coverage functionality into InsureRM, so users can enter premium and percentage information in a variety of period formats and have annualized revenue calculated automatically.

By leveraging product group factors, multiple variable compensation numbers are also calculated according to specific parameters of the line's compensation plan.



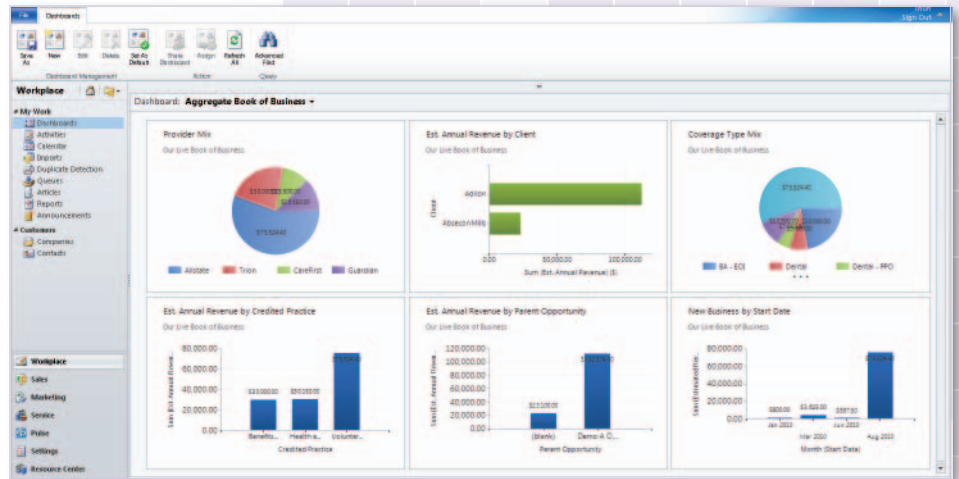
Prospecting Dashboard: Actionable Competitive Intelligence for Targeted Pursuit

Line start and end dates are provided to indicate the actual timing of revenue, allowing a single opportunity to reflect multiple revenue start and end dates and diverse payment timing. A cash-received indicator helps finance reconcile each anticipated revenue stream against actual cash flow.

The insurance-specific Custom Line of Coverage Entity tracks multiple policy revenue for each opportunity and maintains that information at the customer level for ongoing client valuation and "book of business" history. Sales-to-finance transfers are automatic and provide full visibility into the nuances of each deal, while commissions are tracked and reconciled for each sale and customer.

Reaping the Benefits of Neudesic's Expertise

Insurance brokers who partner with Neudesic benefit from the deep domain expertise of our professional services team. Through extensive industry-related project experiences, we have enhanced Microsoft's CRM platform by creating various templates and frameworks that map business needs and accelerate the implementation of insurance industry solutions. By leveraging Neudesic's insurance accelerator during implementation, our clients have achieved quicker time to market and saved 10% to 15% of discovery, design and development costs.



Aggregate Book of Business Dashboard: Client data by practice, coverage, provider and key dates for real time analysis of diversification and impact across your client base.