

# ORACLE CRM ON DEMAND FINANCIAL SERVICES EDITION – INSURANCE SOLUTION

## ORACLE® CRM ON DEMAND

### THE WORLD'S MOST COMPREHENSIVE CRM ON DEMAND SOLUTION

- Easy to use
- Fast to deploy
- Powerful analytics
- Built-in contact center
- Prebuilt industry solutions
- Embedded marketing, sales and service best practices

#### KEY FEATURES

##### REFERRAL MANAGEMENT

- Automatic lead creation
- Ability to view all referrals made by a particular client

##### HOUSEHOLD MANAGEMENT

- Single household view
- Household, financial, and investment risk profile tracking

With Oracle CRM On Demand Financial Services Edition – Insurance Solution, you can grow distribution revenues and improve agent loyalty. Oracle CRM On Demand Financial Services Edition – Insurance Solution is the first Software as a Service (SaaS) CRM solution designed specifically for insurance professionals. It enables insurance agents and brokers to better leverage their clients' profile and portfolio information to identify cross-sell and up-sell opportunities and improve customer retention.

The screenshot shows the Oracle CRM On Demand Financial Services Edition – Insurance Solution interface. The main window displays the 'Opportunity Detail' for 'Joseph Alter'. The interface includes a navigation pane on the left with options like 'Contacts', 'Create', 'Appointment', 'Contact', 'General Information', 'Household', 'Lead', 'Medical & Family History', 'Notes', 'Opportunity', 'Process Status', 'Riders', and 'Task'. The main content area displays 'Opportunity Detail: Joseph Alter' with fields for 'Key Opportunity Information', 'Quick Quotes', and a 'Get Quick Quotes' section with input fields for 'Insured's First Name', 'Insured's Last Name', 'Insured's Date of Birth', 'Insured's Gender', 'Insured's Weight (in lbs)', 'Is Insured a tobacco user', 'Insured's Sum Assured (in \$)', and 'Policy Duration'.

## Drive Channels Revenue

Oracle's CRM On Demand Financial Services Edition – Insurance Solution addresses the distribution needs in the Insurance Industry. It provides partner profiling features that capture all information related to partners in a common location. It equips channel managers to perform joint business planning and marketing campaign and analyze partner performance, allowing a carrier to understand its channel better and increase sales and profits across channels.

## Improve Referral Management Effectiveness

Oracle CRM On Demand Financial Services Edition – Insurance Solution provides a seamless process for agents to track referrals and leads actively. Starting with the contact profile, agents can view all referrals made by a particular client. As agents log

each referral, new leads are created immediately, which ensures that referrals do not get lost, thus improving follow-up rates and referral effectiveness.

#### KEY FEATURES

##### PORTFOLIO TRACKING

- Consolidated book of business tracking
- Portfolio hierarchy

##### LEAD AND OPPORTUNITY MANAGEMENT

- Easy lead creation, assignment and qualification
- Lead and opportunity revenue tracking

##### CONTACT MANAGEMENT

- Single view of client book of business
- Financial and investment risk profiles

##### EMAIL INTEGRATION

- Integration with Microsoft Outlook and Lotus Notes
- Automatically link incoming and outgoing emails with associated contacts, accounts, leads and opportunities

#### KEY BENEFITS

- Increase visibility across channels and improve channel revenue
- Increase cross sell and up sell
- Improve customer retention
- Improve agent effectiveness and retention
- Improve closing ratio
- Decrease expenses
- Improve ROI

## Build Stronger Client Relationships

Agents build trust by demonstrating a solid understanding of a client's financial and personal needs and interests. Oracle CRM On Demand Financial Services Edition – Insurance Solution enables agents to track a client's interests, such as investment interests in annuities or life insurance, or personal interests such as sports or hobbies. Whether to build personal rapport with a client or to generate new sales opportunities, tracking client interests is a key component of establishing client relationships that generate future business.

## Obtain a Consolidated Profile of Households

Oracle CRM On Demand Financial Services Edition – Insurance Solution provides agents with a complete 360-degree view of a client's household finances with full understanding of each household's financial and investment risk profile, including consolidated portfolios, leads, opportunities, notes, and tasks for all contacts in a household and also create appointments, tasks, opportunities and service requests directly at the household level. Advisors easily control their view of a household's financial profile by selecting which household members will be included in the consolidated household view. This provides advisors with instant access to important client information needed to serve clients and effectively cross-sell and up-sell additional insurance and financial services products.

## Access Comprehensive Up-To-Date Client Portfolios

Oracle CRM On Demand Financial Services Edition – Insurance Solution provides agent convenient access to a client's comprehensive portfolio of insurance policies so that they can deliver accurate, relevant, and customized advice to their clients. A portfolio hierarchy lets advisors track multiple levels of detail within a customer's portfolio. For example, a client may have a variable universal life insurance policy containing sub-accounts, and within each sub-account are specific holdings. Tracking this level of detail of the customer's investments increases the knowledge and understanding of the client's financial picture and allows an advisor to serve clients more effectively.

## Improve Agent Loyalty

Oracle CRM On Demand Financial Services Edition – Insurance Solution incorporates business processes that make it easy for agent to access important contact, household, and portfolio information to provide personalized service to their clients. Insurance-specific capabilities, such as the Producer Success Model, equip agents with the sales productivity and effectiveness tools to maximize business performance. Since ease of doing business is a key factor in cultivating and maintaining agent loyalty, providing an intuitive and easy-to-use solution with the latest methodology to make agents successful, will result in improved agent loyalty





## Bottom Line

Only Oracle CRM On Demand Financial Services Edition – Insurance Solution delivers capabilities to grow your business profitably. It provides solutions for channel managers to access partner information centrally and freeing up their time to work on revenue-generating activities such as business planning and joint marketing campaigns. It also equips your agents with the productivity tools to become more productive and efficient, resulting in increased revenues and improved loyalty.

In sum, Oracle CRM On Demand Financial Services Edition – Insurance Solution enables organizations to get smarter, get more productive, and get the best value, period.

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For more information about Oracle CRM On Demand, visit [oracle.com](https://oracle.com) or call +1.800.ORACLE1 to speak to an Oracle representative.

### Integrated Cloud Applications & Platform Services

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