



Highlights

- Helps insurers accelerate Microsoft Dynamics CRM implementation by integrating prebuilt data models, workflow and analytics into the CRM
 - Includes optional cognitive capabilities that help you improve customer loyalty and deliver engaging customer service experiences
 - Provides on-premises or cloud deployment options for optimal flexibility
 - Offers financing options to meet your specific needs
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IBM Insurance Solution for Microsoft Dynamics CRM

Deliver world-class customer experiences and optimize efficiency

When it comes to enhancing customer loyalty, an excellent customer experience is critical. In a recent IBM Institute for Business Value survey, only 42 percent of surveyed customers said their insurer could be counted on to provide good service.¹ Almost half of respondents indicated they left insurers that were too slow to react to their changing needs.²

To stay competitive, you require actionable insights and tools to:

- Deliver world-class customer experiences
- Drive user adoption while optimizing productivity
- Manage key performance indicators seamlessly
- Improve customer loyalty and encourage growth
- Capitalize on each and every prospect and customer interaction while increasing wallet share

Achieving these goals requires a 360-degree view of the customer household and effective lead conversion tools—all for a cost-effective price.

IBM® Insurance Solution for Microsoft Dynamics CRM helps you deliver industry-leading experiences to your life insurance policyholders and improve operational efficiency. The add-on offering is an integrated layer on Microsoft Dynamics CRM. By providing a robust toolkit designed to shorten your software development lifecycle, the solution can speed your organization along the path to customer-centricity. Additionally, the offering incorporates insurance-specific processes and advanced analytics. These capabilities can empower your teams with the 360-degree customer household view and the support they need to deliver compelling customer experiences.

And to better support your agility needs, the solution can be tailored to your line of business and deployed on-premises, on Microsoft Cloud or on IBM Cloud.



Helping you strengthen your relationships with policyholders

- **Holistic customer household views:** An industry-leading customer experience begins with a 360-degree view of your policyholders — across all channels. Our solution provides a holistic view of your life insurance policyholders, such as their demographic information and extensive details on their interactions with your company. This information is accessible through audit and case histories and marketing campaign metrics. Plus, you can access this information through a streamlined interface, helping you boost your team’s productivity.
- **Robust sales-campaign capabilities:** Our offering helps you stay a step ahead of your competitors by using advanced analytics to generate the most appropriate offers and actions for customers based on their unique preferences and demographics. By deploying prebuilt analytical models for cross-sell and upsell opportunities, the solution enables you to create compelling customer campaigns. And by using analytics to calculate customer churn scores, the offering can empower your sales and marketing teams with the insight they need to improve customer retention.
- **Optional cognitive assistance capabilities:** Providing outstanding service to your policyholders requires “always on” operations. As an optional service, we offer an “automated assistant” to help you manage customer inquiries around the clock. Powered by cognitive machine learning, the tool, when configured, can answer common customer questions, resolve complaints and process important transactions, such as service requests.

Optimizing operational efficiency with prebuilt insurance processes

Today insurers require smarter and streamlined operations to save time, reduce risks and track and centralize information. Our offering empowers your teams to be productive wherever they are with centralized access to customer information. Leveraging years of insurance industry experience, IBM Insurance Solution for Microsoft Dynamics CRM provides:

- Data and workflow models for the life insurance industry
- Industry-specific reports and dashboards for insurance agents and sales and marketing personnel

The prebuilt insurance analytical models and automated workflows enable you to:

- Automate business processes and customer requests across channels
- Streamline case history tracking, call and inquiry handling, and escalations— enhancing business efficiency and reducing overhead costs
- Enhance agent productivity with customer service software designed to deliver customer insight and answers at the right time
- Maintain audit history, customer interaction history and tracking of various service requests
- Monitor and track sales and marketing performance using real-time dashboards and reports

IBM Insurance Solution for Microsoft Dynamics CRM: Key capabilities



Figure 1: IBM Insurance Solution for Microsoft Dynamics CRM helps you efficiently manage virtually all customer transactions.

Why IBM

By choosing IBM and Microsoft, you can take advantage of vast expertise, ready-to-use software and best-of-breed solutions specially designed for insurance. IBM is one of Microsoft's largest global partners and has been a member of the Microsoft Certified Partner program since 1995. Utilize our vast experience to advance your organization's growth and profitability through the IBM Insurance Solution for Microsoft Dynamics CRM.

For more information

To learn more about the IBM Insurance Solution for Microsoft Dynamics CRM, please contact your IBM representative or visit the following website: ibm.com/services/us/en/microsoft



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1 IBM Institute for Business Value. “Capturing hearts, minds and market share: How connected insurers are improving customer retention.” May 2016.

2 Ibid.



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