

With Valoores' In'CRM Insurance Solution, you can grow distribution revenues and improve agent loyalty. Our solution is one of the first Software as a Service (SaaS) CRM solutions 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.

**You Have The Value  
We Bring You The Added Value**

### Key Benefits:

- Increase the visibility across your channels and improve channel revenue
- Increase cross sell and up sell opportunities
- Allows for great improvement in customer retention and customer satisfaction
- Improves the agent's effectiveness in addition to their retention
- Improve your overall business closing ratio
- Decrease your overall expenses and costs
- Improve your Return On Investment

■ Valoores' in'CRM Insurance Solution addresses the distribution needs in the Insurance industry. We provide partner profiling features that are capable of capturing all information in a common environment. Our solution equips channel managers with the ability to perform joint business planning and marketing campaigns as well as analysis of partner performance, thus allowing a carrier to understand its channel better and increase sales and profits across channels.

■ in'CRM Insurance provides a continuous process for agents to track referrals and leads. Starting with the contact profile, agents are able to view all referrals made by a particular client. As agents log each referral, new leads are created instantaneously, which ensures that referrals do not get lost, thus improving follow-up rates and referral effectiveness.

■ Agents build trust by demonstrating a solid understanding of a client's financial and personal needs and interests. Valoores in'CRM Insurance enables these agents to track a client's interests. Whether to build personal rapport with a client or to generate new sales opportunities, the ability of tracking client interests is a key component of establishing client relationships that generate future business.

■ Our in'CRM Insurance solution also 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 and needs, including consolidated portfolios, leads, opportunities, and tasks for all contacts in a household. This gives advisors instant access to important client information needed to serve clients and effectively cross-sell and up-sell additional insurance and financial services products.



# Insurance

## 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

### 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

■ The Valoores in'CRM Insurance Solution provides agents convenient access to a client's comprehensive portfolio of insurance policies in order to effectively deliver accurate, relevant, and customized advice to their clients. The availability of the portfolio hierarchy lets advisors track multiple levels of detail within a customer's portfolio. Tracking this level of detail of the customer's investments increases the knowledge and insight of the client's financial needs and situation and thus allows an advisor to serve clients more effectively.

■ Our Solution incorporates business processes which allow agents to access important contact, household, and portfolio information and provide personalized service to their clients. Our insurance-specific capabilities equip agents with the sales productivity and effectiveness tools needed to maximize their business performance. Since ease of doing

business is a key factor in cultivating and maintaining agent loyalty, our offering of an intuitive and easy-to-use solution will result in improved agent loyalty.

■ All you need grow your business profitably is the Valoores in'CRM Insurance solution. It provides solutions for channel managers to access partner information in a centralized manner and free up their time to work on revenue-generating activities such as business planning and joint marketing campaigns. Agents are also equipped with the productivity tools to become more productive and efficient, resulting in increased revenues and improved loyalty.

■ In summary, the Valoores in'CRM Insurance Solution enables organizations to gain insight, business intelligence and knowledge of their customers and business which allows for efficiency, effectiveness, profitability and finally productivity all while getting the best value.



Valoores was founded in 2011 by business intelligence experts to make raw business data meaningful and understandable for all people in all sorts of industries. It was built on the solid foundation of knowledge and experience of business intelligence and data warehousing which would ultimately bring our clients strides ahead in their competitive markets.

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