

VUE CRM for Insurance is an adaptable customer relationship management system (CRM) built especially to meet the marketing, sales and distribution management needs of insurance organizations.

Streamline Marketing & Sales Operations

Meaningful interactions with customers and producers lead to new revenue opportunities. With a 360-degree customer view, holistic lead and opportunity tracking, and structured cross-selling, VUE CRM for Insurance helps your sales and marketing staff focus on the right opportunities, products, and customers.

Automate common marketing tasks, ensure consistent follow-up, and improve responsiveness.

Sales people spend less time looking for information and more time putting it to use with powerful dashboards.



Automate Marketing Best Practices

VUE CRM for Insurance minimizes busy work and gives your staff time to focus on effective marketing. Powerful workflow capabilities help automate lead distribution, ensure consistent follow-up, simplify approvals, and implement marketing best practices. With a 360-degree customer view, powerful segmentation tools, and insightful reporting you'll find the right offer for the right audience.

Advance Agent Productivity

With a native Microsoft Outlook® client, contextual data visualizations, and mobile access, VUE CRM for Insurance puts the right information in your agents' hands. Integrated agent recruiting tools enable you to build your distribution channel with the same productivity benefits. With powerful workflows, guided sales processes, and streamlined goal tracking your sales teams have the right tools to deliver consistent results.

Maximize Customer Retention

With a full view of member and agent records, comprehensive record detail, and multi-channel communications support, your customer service professionals can engage with customers consistently. VUE CRM for Insurance enables you to expedite approvals, streamline escalations, and improve the efficiency of the overall renewal process.

Affordable Care Act Ready

The markets for small group and individual plans are expected to triple by 2019. To participate in these competitive markets, health plans must quickly move their sales processes online to reduce costs, decrease points of failure in service and retention processes, and interoperate with state Health Insurance Exchanges (HIEs). VUE CRM for Insurance is built for the needs of all insurance organizations, but the unprecedented change in health insurance demands flexibility and adaptability this solution provides.

About VUE CRM for Insurance

VUE CRM for Insurance Features:

Powerful Sales Pipeline Tools

- Lead to policy visibility
- Central email, appointments, tasks, contacts, and customer information
- Holistic account management
- Automated alerts and customizable workflow
- Intelligent lead routing
- Conversion and cross-sell indicators
- Centralized document management
- Offline support and robust mobile device access

Flexible Marketing Platform

- Embedded data cleansing capabilities
- Segmentation tools and conditional formatting rules to identify prospects and build marketing lists
- Built-in mail-merge and email templates
- Campaign budgets, tasks, activities, and collateral
- Holistic response tracking
- Real-time dashboards, pre-built reports, and inline data visualization
- Comprehensive goal management
- Automatic tracking of opt-in/opt-out preferences

Member Retention Tools

- Track the details of every interaction, including quotes, orders and policies
- Out-of-the box or configurable dashboards, drill-down analysis, and inline data visualization capabilities
- Service record auditing
- Shared knowledge repository
- Web self-service

Distribution Management

- Pre-Integrated with VUE Software's powerful suite of Distribution Management solutions including VUE Compensation Management, VUE Producer Portal and VUE IncentivePoint.

Reporting

- Real-time dashboards
- Streamlined goal management
- Real-time sales forecasts and pipeline reports.
- System-wide auditing

Value

VUE CRM for Insurance helps deliver rapid return on investment for sales and marketing automation projects through:

- Comprehensive CRM solution that spans the entire sales process, from campaign lead generation all the way to member enrollment and renewal.
- Grow revenue and market share by responding quickly to reform-driven individual, small group and exchange opportunities.
- Reduce custom legacy integration costs.
- Reduce implementation and adoption risk.

Technology

VUE Software utilizes Microsoft platform technologies as the foundation for all system development, providing a standard architecture to facilitate enterprise integration and assure a cost effective implementation. VUE CRM for Insurance requires separate licensing and deployment of Microsoft Dynamics CRM.

VUE Software is an active member in Microsoft's Insurance Value Chain (IVC) program and works closely with Microsoft to ensure leading system integration, scalability, reliability and security. VUE CRM for Insurance is compatible with the Microsoft Health Plan Sales Solution for Microsoft Dynamics CRM.

About VUE Software®

VUE Software, the product division of Computer Solutions and Software International (CSSI), is a leading provider of Distribution, Incentive Compensation and Sales Performance suites. Our solutions are built to meet the unique needs of the life, health, property and casualty and managing general agent verticals and backed by over twenty years of insurance experience.

For More Information

For more information on VUE Software or to arrange a demo, visit www.vuesoftware.com, email us at info@vuesoftware.com, or call the VUE Software Sales Information Center at 1-877-488-3763.



Scan For a Digital Copy