

# Wipfli Connect


FOR INSURANCE

CRM that works the way you do.


**Wipfli Connect for Insurance is a unique and powerful relationship management tool.**

**But it's also much more than that.**

Built on Microsoft Dynamics® CRM, it's a solution tailored to your industry. And it's made to work the way you already work.



**Wipfli Connect for Insurance creates one simple-to-use interface across your entire enterprise, allowing you to effectively manage policyholder information, improve customer service and keep everyone up-to-date on every customer interaction.**



**Enhance customer service.** Complete information on every policyholder is in one central, easily accessible place helping you deliver quality, personalized service with every interaction.

**Optimize customer retention.** Comprehensive workflow and case management capabilities ensure every communication opportunity is tracked through its lifecycle so you never miss an important touch point with any customer.

**Streamline communication flow.** Better manage your sales channels, whether you use independent agents, captive agents, sell direct or rely on a combination of channels.

**Increase renewals and cross-selling opportunities.** By centrally tracking all customer information, your organization gains timely insights into customer-specific needs, helping staff and agents identify the right products and services to offer while delivering relevant customer-focused communication.

**Improve processes and gain efficiencies.** Using one central source of policyholder information lets you improve workflow by automating manual tasks, eliminating duplicate data entries, and streamlining processes across functions such as underwriting, policy management and claims.

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[www.wipfli.com](http://www.wipfli.com)



### **Enhance customer service and build policyholder trust with better insights.**

Wipfli Connect for Insurance turns data into actionable information and gives you—and everyone in your organization—a clear view of accurate and comprehensive policyholder information.

It uses Microsoft Dynamics® CRM as a platform while working seamlessly with Microsoft Outlook® to build on business applications you're already familiar with. It lowers the learning curve and gives your organization a familiar platform to grow your business.

### **Leverage comprehensive customer intelligence and put more flow into your workflow.**

Greater efficiencies lead to greater customer service. Wipfli Connect for Insurance lets you increase productivity and improve the customer experience.

**Wipfli Connect for Insurance gets everyone on the same customer service page to ensure the efficiencies you need now and the customer loyalty you want now and always.**

- Enhance customer service by centrally managing customer interactions, putting customer information in the hands of those who need it, when they need it
- Improve customer retention by integrating service, sales, and marketing
- Drive new business with greater cross-sell and up-sell ability
- Support best practices through integrated workflow and process control
- Ensure better sales channel management and increase effectiveness of sales and marketing campaigns

It integrates marketing, sales and service functions to provide each member of your customer service team easy access to updated and accurate policyholder information.

Wipfli Connect for Insurance provides a centralized policyholder view letting you put valuable customer data quickly in the hands of those who need it. From new business to claims management, your staff members can easily access any customer profile along with policy history, claims history, relationships and support records.

You also gain additional efficiencies through workflow automation and streamlined processes to help your organization focus on key responsibilities that impact expenses and premiums, new business and renewals.

The result is a truly customer-centric organization with better-equipped service representatives, reduced operating costs, and enhanced service delivery.

### **Maintain customer loyalty. Obtain new business.**

With a 360° view of each policyholder, Wipfli Connect for Insurance lets you track customer contacts centrally to create meaningful marketing communications that engage your existing customers and strengthen your relationships. Automated and customizable, it lets you maximize opportunities to cross-sell customer-specific products and services and manage policy renewals with ease.

You can also track leads easily and ensure new business opportunities are pursued in a timely manner. Prospective information can be maintained for any future sales and marketing outreach campaigns.

*Comprehensive. Collaborative. Customer Service.  
That's Wipfli Connect for Insurance.*



**Microsoft** Partner

Gold Customer Relationship Management

For more information about Wipfli Connect for Insurance, visit

[www.wipfli.com/wipfliconnect](http://www.wipfli.com/wipfliconnect)

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