



eCRMagic

enriching agency business

CONVERTING EVERY
CHALLENGE TO AN OPPORTUNITY

TRANSFORM YOURSELF TO



multi platform



worldwide presence

social platform



strong network



professionalism



insurance CRM

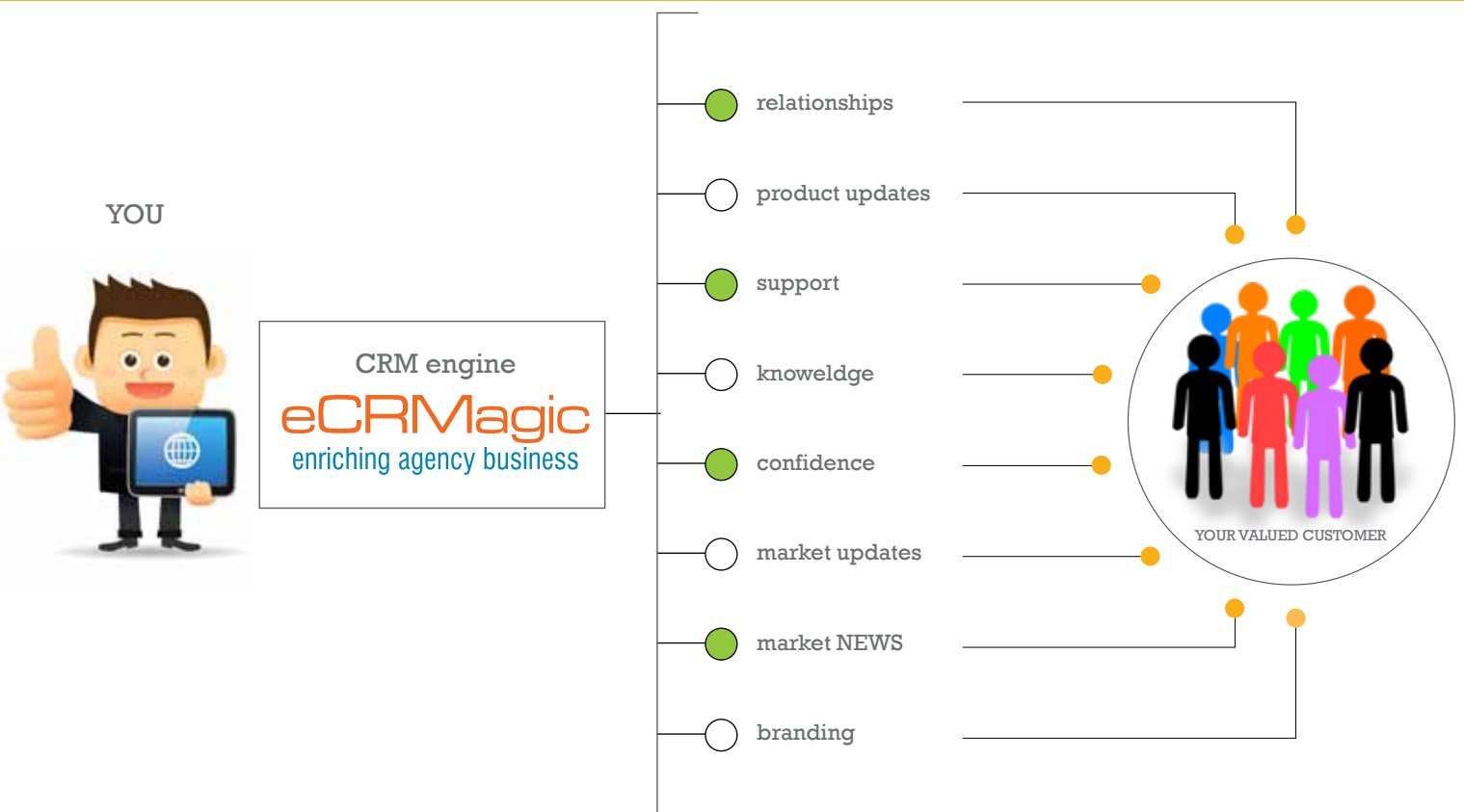


- Insurance selling is all about the relationships you share with your customers.
- Good relations with your customers and leverage on it for generating business.
- When the business is small, customers have a privilege of your personal attention.
- Make feel that they are the most important entity of your business. They have to be serviced by your staff instead of yourself.

You know you need to understand and leverage your most valuable asset of your customers.

To achieve that, you need to centralize customer information within your entire organization, maximize opportunities through complex channel relationships, and streamline operations.

You are also faced with increasing costs of servicing your customers optimally while at the same time your customers expect greater and an international range of services. Address each of these challenges with a complete technology solution - one that is designed specifically for your unique insurance business requirements. This is where eCRMagic can help you.



about eCRMagic

eCRM stands for Electronic Customer Relationship Management. eCRMagic is a technology driven service, which is aimed at enhancing your customers satisfaction experience through effective communication and thereby locking their patronage with you for a longer period of time.

eCRMagic
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One of the biggest challenges you face in maximizing business from your customers is in identifying their requirements. With a clear idea of each customer relationship with your organization, you are better able to target customers and deliver what they need.

eCRMagic provides the means for you and your customer to get a 360-degree view of their insurance portfolio and a history of interactions with your organization.

You can also target your esteemed clients for up-selling or cross-selling objectives. Furthermore, because you have information on products or services that they have purchased from, you have a good way of measuring how they will respond to similar proposals.

This software allows you as an agent to maximize every opportunity to enhance your relation with your customers by automatically wishing them on their special days like

Anniversaries, Birthday, Events & Occasions, Every Day Cards, Festival cards and many more.....

CUSTOMERS



SERVICES TO YOUR CUSTOMER



Birthday



Anniversaries



Events & Occasions



Every Day Cards



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● Reduces the cost per transaction with your customer

● You are constantly in touch with your customers
24 hours of the day, 7 days a week and 365 days a year

● Your customers have their information on their fingertips

● This self service model reduces your servicing costs while at the same time enabling you to provide support always.

why need eCRMagic

Anywhere anytime
information access to
your customers

24 x 7 x 365
customer service offices

Reduction in your
transaction costs

Powerful analytical tools
and planners to vitalize
your business

Automation of routine tasks like
Premium, Maturity, SB and New
Product intimations

Increasing your service
and marketing reach

Online Insurance
Portfolio for your
customers. Information
when they want it



Branding your
organization

Support to various market
segments like Life and
Non-Life Insurance,
Mutual Funds, Bonds,
Small Savings etc.

Staying miles ahead of
your competitors.

Profit multiplying tool.

Cementing relationships with your
customers through all channels
(eGreeting and SMS messages)
Self paying software. Initial
investment recovered in the first
year of operations. Profits thereafter.

Tapping International
clients. Strong structure
to enable future up
gradation as per
requirements.

Empowering your
customer with knowledge
about insurance and
investments.

Personal care provided even as
your business increases. Personal
Touch continues through auto
generated messages and greetings.

Extending support to your
customers through use
of advanced technology.
Providing service
everywhere.

features of eCRMagic

AMAZING FEATURES THAT MULTIPLY YOUR PROFIT, SUBTRACT YOUR COSTS



Auto Generated Messages

Don't worry about forgetting to wish your clients on their special days. Birthday greetings, Anniversary wishes, Congratulatory messages, Festival greetings are automatically sent as per your settings.

Custom Intimations

Inform your clients about newly launched policies and benefits to be derived from certain policies. Use this tool to draft different messages that you want to convey to your customers. Just imagine, the last thing a customer would expect is a best of luck greetings for your Childs exams. It would increase your value in his eyes. All this with the minimum of intervention from your side.



Online Product Info, Articles & News

Today information is power. Empower your customers by informing them about the different product details. Provide them with thought provoking and informative articles, which can only make it easier for you to explain the need of insurance & financial investments in their lives.



Online Portfolio Access

A desktop based application, enabling you to give provide insurance and investment based information to the clients on a CD. Containing an exciting application that gives your client a presentation on their current **Comprehensive Insurance Chart, Cash Flow Chart, Premium Calendar, Non-Life Insurance chart, Small Savings investment** etc. Additionally you can brand yourself with details on your profile, achievements as well as provide useful information like LIC I GIC forms, product details and even stuff like children's games and recipes. The idea, is to brand yourself, as well as create bonding, loyalty and interest with the entire family of your customer.

Policy No.	Plan Name	Policy Start	Term Date	Sum Assured	PI	Premium	Premium Certificate
1511201	Endowment Life Policy	14-04-94	18-Nov-99	500000	7%	2882.00	Plan Certificate
0346038	Endowment Life Policy	14-03-95	18-May-99	200000	7%	1094.00	Plan Certificate
0346776	Endowment Life Policy	14-03-95	18-May-99	200000	7%	1094.00	Plan Certificate
0346776	Endowment Life Policy	14-03-95	18-May-99	200000	7%	1094.00	Plan Certificate
0346776	Endowment Life Policy	14-03-95	18-May-99	200000	7%	1094.00	Plan Certificate
1412222	Term Insurance	14-03-95	18-May-99	200000	7%	1094.00	Plan Certificate
1412222	Term Insurance	14-03-95	18-May-99	200000	7%	1094.00	Plan Certificate
1412222	Term Insurance	14-03-95	18-May-99	200000	7%	1094.00	Plan Certificate

AMAZING FEATURES THAT MULTIPLY YOUR PROFIT, SUBTRACT YOUR COSTS



The screenshot shows a web form titled "Calculation Parameters" with a "Calculate" button in the top right corner. The form is divided into two tabs: "Basic Info" and "Special". Under "Basic Info", there are fields for "Name of Proposer", "Date of Birth", "Sex" (with radio buttons for Male and Female), "Comm. Date" (with a date picker set to 17-Mar-2016), "Plan" (a dropdown menu), "Mode" (a dropdown menu), "Term / Prem Term" (two dropdown menus), and "Sum Assured". At the bottom of the form, there are "Reset" and "Next >" buttons. A note at the bottom states: "Note: Rider premium (Double Accident Benefit)/Term Rider Benefit/Critical Illness Benefit Extra) Speak to the Advisor now".

Analytical Tools

The software provides cutting edge analytical tools like the Basic Insurance Needs Analysis, Comprehensive Insurance Needs Analysis, Wealth Potential Analysis, Insurance Eligibility Check, Premium Calculator, Loan Calculator, Surrender Value Calculator etc. In addition there is the Comprehensive Insurance chart, Premium Calendars, Cash Flow Chart, Status Reports and many other powerful applications for you and your customers to use.

Online MIS

Track the browsing and selection choices of your customers. View their interests and decide how better you can serve them. View the reports, which will tell you which policies have interested the majority of your clients. This will enable you to create powerful as well as targeted sales and marketing strategies, thereby increasing your conversion rate.



Auto Pilot Service

As one of the top performing insurance professionals, your time is often not your own. Moving from one meeting to another, the time you might need to spend on your website is limited or sometimes impossible.



The Auto Pilot feature of eCRMagic takes over your job of taking care of your website. Updating **articles, news, banners** (another point of sale) and also targeted direct marketing campaigns. All these while you attend to other key points of your business. The Auto Pilot is like a copilot, working while you relax, but with control never leaving your hands.

You can be assured that the updating is correct as an expert Datacomp employee looks after it. This feature also significantly reduces your transaction & operational cost as your work is taken care of by the Auto Pilot.

Online MagicSMS

Most individuals carry around a mobile phone now a days and that is one of the easiest means staying in touch.

The online MagicSMS automatically keeps sending out intimations and messages once you have made the settings directly from your website. This removes the tension of constantly keeping track of your messages and you also don't require anyone to look into it every day. A power packed.

