

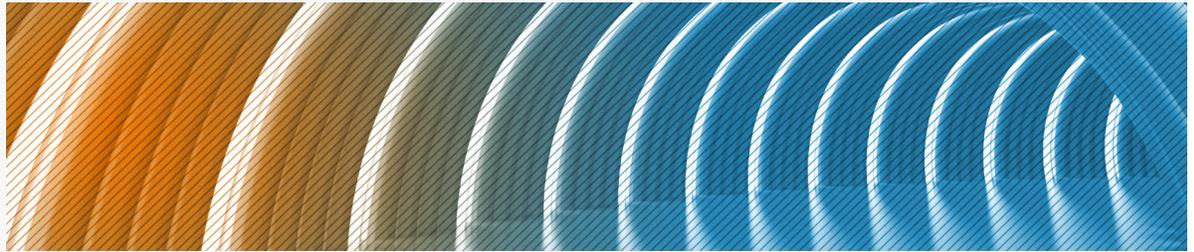
CRM FOR DISTRIBUTORS

A MICROSOFT-INTEGRATED CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM BUILT FOR INSURANCE.

Despite the wonderful efficiencies and insight a customer relationship management tool can bring to an office place in theory, the success of these systems often doesn't fully materialize. iPipeline is working to dramatically change this by developing a better out of the box CRM. It's called iPipeline CRM for Distributors, and it works seamlessly with your current iPipeline Agency Integrator agency management system. You'll be able to use the data in your AI AMS to more effectively manage and market to your agents to generate additional revenue.

A CRM SHOULD SIMPLIFY WORKFLOWS

Most CRM systems are robust, there is often a heavy learning curve, and it's just one more program that needs to be dealt with on a daily basis. Distributors, meet iPipeline's CRM. An insurance-specific CRM built on a widely-used enterprise platform, Microsoft Dynamics, equipped to manage and maintain contacts, activities, and opportunities from anywhere.



DESIGNED TO AVOID OBSTACLES

iPipeline CRM was designed to avoid common obstacles with integration and adoption. If you are familiar with Outlook, iPipeline's CRM will be intuitive. The system is flavored with insurance terminology, and features to fit your needs and workflows. Outlook, CRM, and AgencyWorks all sync in real-time to give you accurate, easy access to CRM from the office, home, the road, or wherever you are.

AUTOMATE AGENT RECRUITING

Using iPipeline CRM, you can automate agent recruiting and management, streamline sales support, launch and track marketing campaigns, follow opportunities, manage the pipeline, and identify and nurture relationships with top producers via built-in analytics.



FEATURES:

Integrates and is embedded into Microsoft Outlook, so there are no additional software applications

Lead tracking functionality to recruit new agents, profile new prospects, and retain existing agents

Pre-populates with essential information from your iPipeline Agency Integrator agency management system. It leverages data that you already have in your organization to create efficiencies

Synchs with other iPipeline tools, including Forms, Illustrations and iGO e-App

Dashboard reporting to creates relevant campaigns with accurate segmentation

Delivers visibility into agent and production data and hierarchies

BENEFITS:

Automates sales processes and marketing campaign management

Enables teams to weigh the effectiveness of sales activities against production goals

Speaks the insurance language and knows your business processes right out of the box

View current agent activity and history