TEESSEN CONSULTING

Insure-IV Suite

THE BUSINESS TECHNOLOGY SOLUTION YOU NEED

Client Management
Practice Management
Commission Processing
Financials and Collections

knowledge | innovation | service

Insure-IV Suite

THE BUSINESS TECHNOLOGY SOLUTION YOU NEED

The Insure-IV Suite is a complete practice management solution for Financial Services and consists of a selection of modules covering Contact Management (CRM), Short Term, Assurance, Investments, Credit Life, Medical Aid, Funeral and Commission tracking. The Insure-IV Suite includes Microsoft Outlook integration, SMS services and Content Management to cater for flexibility and integration. The product offers powerful reporting and workflow services.

MODULAR ARCHITECTURE

- CONTACT MANAGEMENT (CRM)
- COMMISSION PROCESSING
- SHORT TERM INSURANCE
- ASSURANCE & INVESTMENTS
- CREDIT LIFE
- MEDICAL AID
- FUNERAL
- TASK MANAGEMENT
- DOCUMENT MANAGEMENT
- COMPLIANCE
- REPORTING & AUTOMATION
- INTEGRATION & WORKFLOW
- DASHBOARDS

flexible solutions for your business needs

TEESSEN CONSULTING PROVIDES A TOTAL END-TO-END SOLUTION

CONTACT MANAGEMENT (CRM)

A central customer database shared by all the modules to provide you with a single view of your client. Whether you need to manage a short term policy, an assurance policy or even administer a medical aid policy, your client data is stored in a central database shared by these line-of-business modules. There will be no duplication of that all important client information.

Combine the above with centralized tracking of all tasks performed by your staff for a client, from capturing a new policy or logging a claim, sending an e-mail or a SMS, making a phone call or just sending a letter. Tasks are standardized and automated for improved efficiency and excellent customer service.

- Centralized view of client portfolio
- Microsoft Outlook integration
- Store all client documents in a central repository with easy access
- Send E-Mail, SMS or make a phone call directly from the system
- Create your own reports from any data in the system

ASSURANCE, INVESTMENT, CREDIT LIFE

Complete your client's portfolio with data for their assurance, investments and credit life policies. Send visually appealing policy schedules and portfolio packs to both client and product provider.

MEDICAL AID & FUNERAL

Keep record of your client's medical aid plan with member data and reward programs.
Administer large scale Group Schemes or individual plans with the integrated Funeral module.

INTEGRATION & WORKFLOW

Use a variety of import- and export functions to easily populate the data or use the rich set of API's and web services to integrate to existing systems.
Create system workflows to perform a variety of background tasks based on your specific business processes.

SHORT TERM INSURANCE

This solution allows you to create and manage a complete short term brokerage for both personal and commercial lines of business. Use the financials and collections modules to collect premiums and manage accounts. Store all policy documents in a central repository and manage all aspects of a short term claim with tasks and templates.

COMMISSION ADMINISTRATION

The Insure-IV suite now includes all the functionalities of a comprehensive commission management system. Underpinning all the line-of-business modules, it allows you to specify commission rules from a short term policy to a funeral plan.
The powerful analysis- and reporting tools provide you with a complete picture of your commission and fee income and adds to better decision making.

Flexible mapping tools allow integration to a vast number of commission file- and statement formats. We currently import commission data from most of the product providers in the financial services sector to provide you with a consolidated view of commission and fee transactions per policy, broker and product. You can then process and share this commission with multiple parties based on flexible, time based sharing rules.

- Calculate commission on various levels using user specific criteria
- Split commission to multiple parties
- Import commission data from Excel and CSV files
- Send recipient commission statement directly to recipients or provide them access to an online portal
- Create powerful management reports
- Integrate to payroll and payment systems

CONSULTING
TRAINING
DEVELOPMENT

The Teessen Consulting team prides itself on its quality of service and we are always ready to provide our customers with effective product training and support on the various modules and will also advise on the best solution for your business.

Talk to us about our services:

- Training on your business data at your office that suites your business processes.
- Report development. Let us build customized business reports, including your specific layout and branding.
- Workflow and integration. Our skilled team will develop work-flow processes and integrate them to existing business systems for an end-to-end solution.
- We also provide development resources for your specific application needs.

TEESSEN CONSULTING

+27 (0)87 550 1427
www.tconsult.co.za

knowledge | innovation | service