

Capability	What to Look For	MS Flex
Client Management	A complete view of each client and their relationship with your brokerage	✓
Policy Administration	Manage policies, amendments, renewals and cancellations	✓
Renewal Management	Identify upcoming renewals and manage the complete renewal process	✓
Claims Tracking	Record and monitor claims from notification through to settlement	✓
Tasks & Reminders	Ensure outstanding work is visible and followed through	✓
Documents	Keep documents associated with the appropriate client, policy or process	✓
Communications	Maintain a history of client communications and activity	✓
Reporting	Turn operational information into useful management information	✓
Workflow	Standardise processes while allowing exceptions to be handled	✓
Configurable Forms	Capture the information your brokerage actually needs	✓
Security & Permissions	Control access according to users, teams and responsibilities	✓
Audit Trail	Maintain a clear history of activity and changes	✓
Carrier Integration	Reduce manual entry through integration with insurer systems	✓
Browser Access	Give authorised users convenient access without specialist desktop software	✓
Data Migration	Bring existing client and policy information into the new system	✓
Ongoing Support	Help that continues after implementation	✓