

InsureCRM

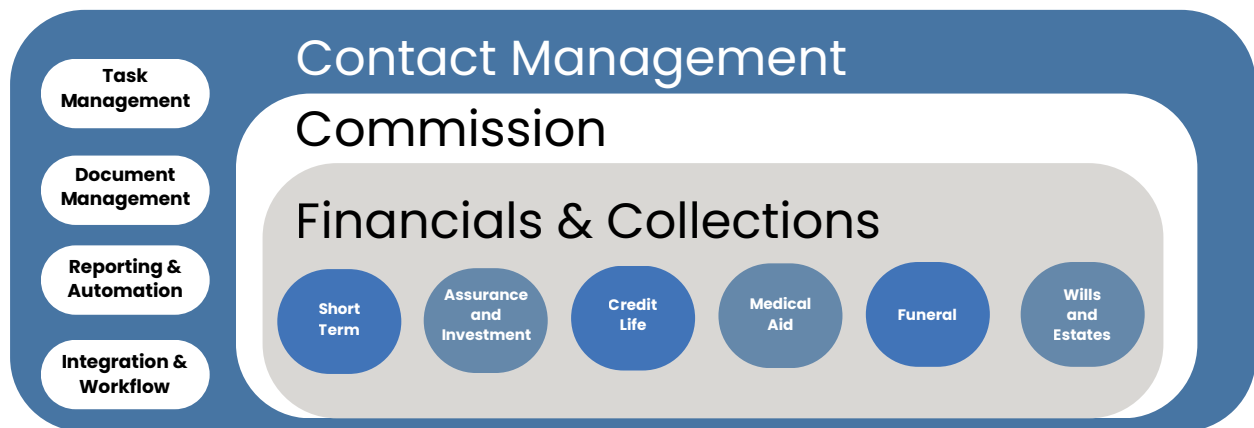
BY TEESEN CONSULTING



THE BUSINESS TECHNOLOGY
SOLUTION YOU NEED

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InsureCRM



The Contact Management module serves as a centralized customer database, providing a unified view of client information and preventing data duplication. It supports managing various policies, tracks staff tasks for each client, and automates communication processes to enhance efficiency and customer service. Key features include:

- Centralized client portfolio view
- Microsoft Outlook integration
- Central document storage with easy access
- Direct communication capabilities (email, SMS, phone)
- Custom report creation
- Automated business processes

Additionally, the Insure Add-in for Outlook allows task creation from emails, ensuring all client communications are stored in one database.

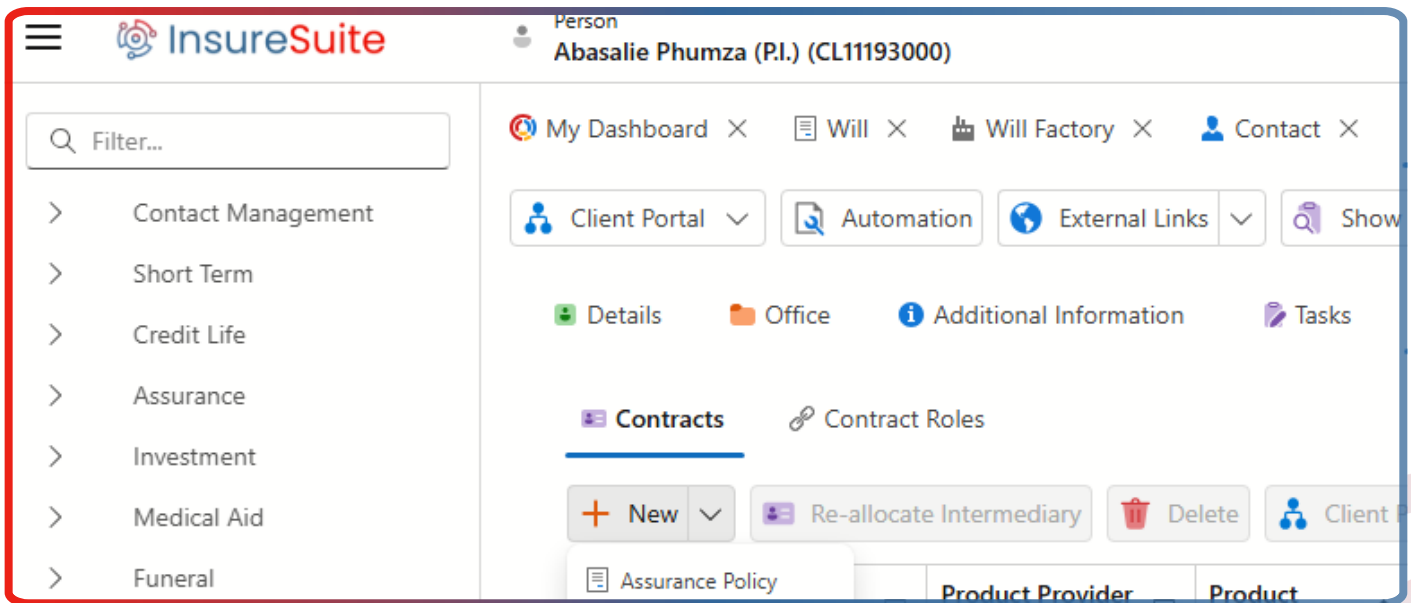
Features:

- Task Dashboards
- Client Networks
- Task Management
- Document Management
- Compliance and Questionnaires
- Reporting & Automation
- Integration & Workflow
- Distribution Lists
- E-mail Services
- SMS service
- Notifications
- Outlook Integration
- WhatsApp Integration
- AI Integration

Reporting:

- All our reports include a powerful report writer and analysis tool allowing business to build their own reports and create powerful management reports.
- We provide professional services to train and assist in report writing.





Task Management:

- Eliminate clutter by creating client-specific tasks.
- Forward tasks and track progress to enhance client servicing.
- Use defined templates for task processes.
- Measurement aids management.

Document Management:

- Transition from paper to digital by storing client documents.
- Utilise references and keywords for easy access to information.
- Store emails, documents, and images linked to client records.

Reporting and Automation:

- Use the Analysis tool for quick data queries for informed decisions.
- Generate standard reports from the Reporting tool and automate report processes.

Integration & Workflow:

- Teessen Consulting offers data flow solutions between systems for seamless business processes.

Infrastructure:

- Cloud-based solutions for Windows and Web applications.
- Advisory services for suitable business solutions.

Training & Support:

- On-site product training tailored to your team's data.
- Support team available for assistance as needed.

Flexible Implementation:

- Selection of application modules.
- Customised solutions based on specific business requirements.



Contact us for more information on any of our products or services

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