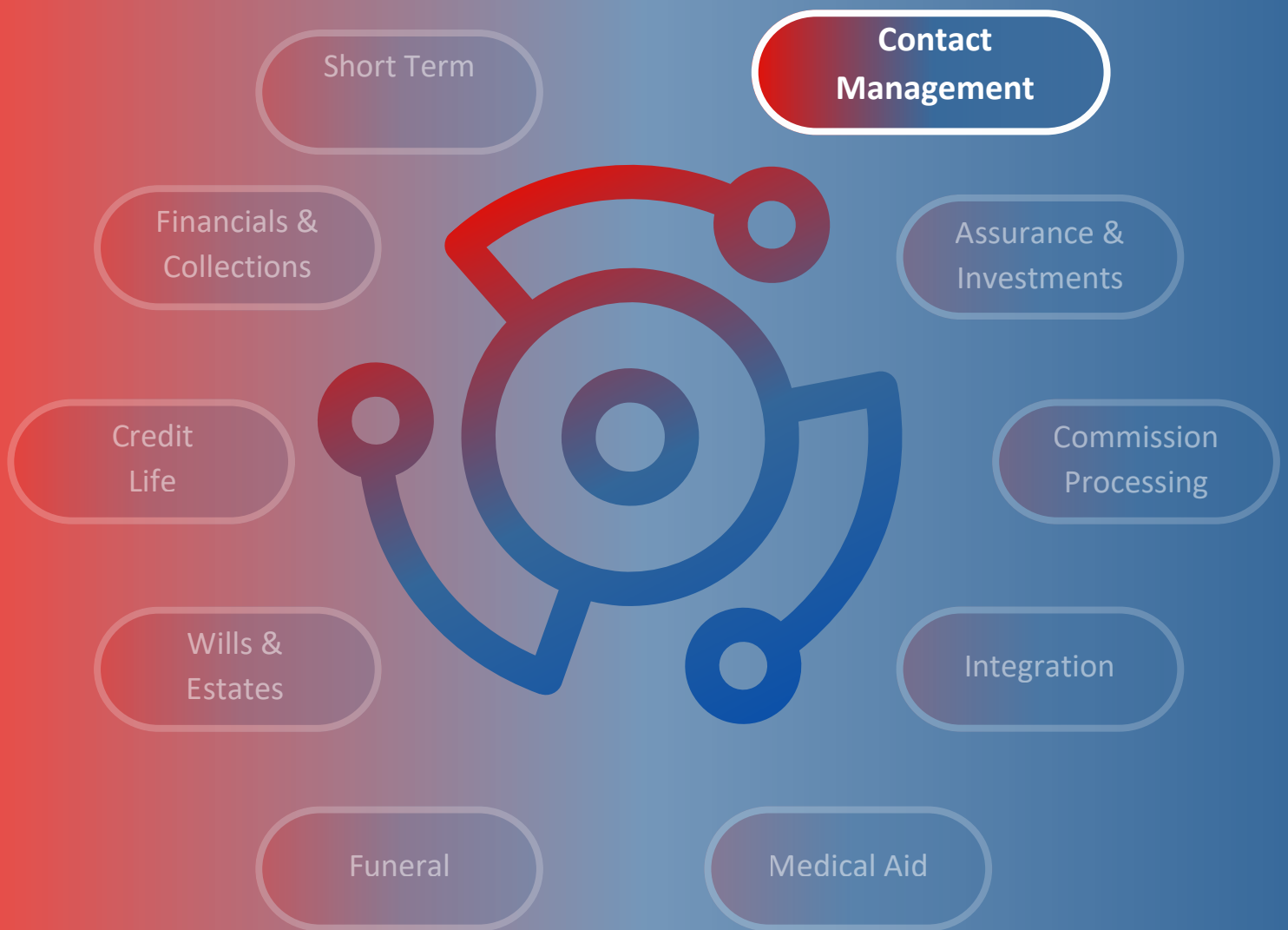


# TEESSEN CONSULTING

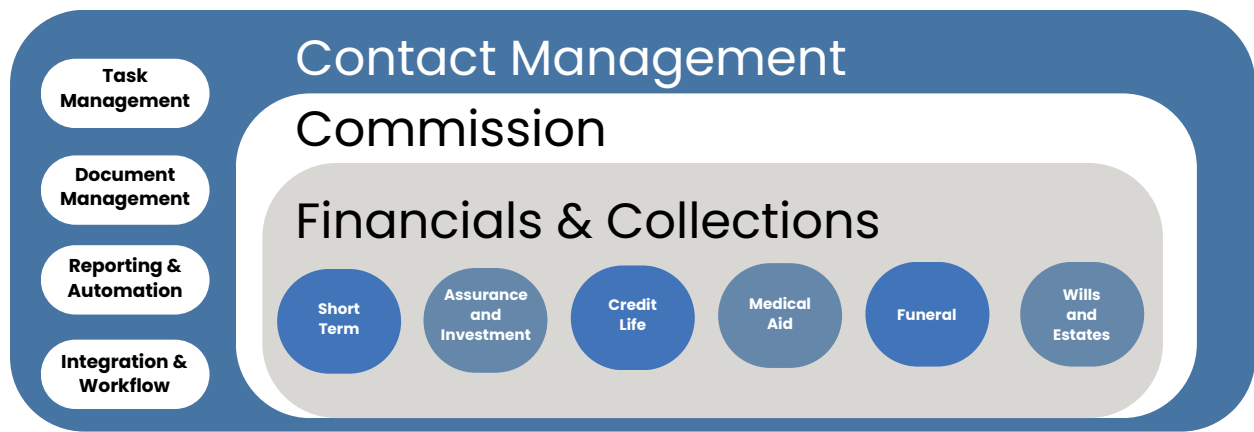
## INSURE-IV SUITE



THE BUSINESS TECHNOLOGY  
SOLUTION YOU NEED

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# CONTACT MANAGEMENT



The Contact Management module is a **central customer database** shared by all the modules to provide you with a **single view of your client**. Manage your client's data and keep it stored in a central database. You can manage a short-term policy, manage an assurance policy, administer a medical aid policy and many more.

There will be no duplication of important client information. The Contact Management module allows **centralised tracking of all tasks** performed by your staff for a client; from capturing a new customer or logging a request, sending an e-mail or a SMS or a letter, making a phone call, etc. **Tasks are standardised and automated** for improved efficiency and excellent customer service.

- A centralised view of Client portfolio
- Microsoft Outlook integration
- Storage of client documents in a central repository with easy access
- Send communications directly from the system (E-Mail, SMS, phone call)
- Create reports based on any data in the system
- Automate business processes

Send all communications to clients e.g. standard welcome letters or advanced mail merge letters, directly from the application to your clients. You can also create and use Distribution lists for your communications to clients.

The Insure Add-in tool for Microsoft Outlook allows you to create tasks directly from an email onto the system. You can effectively and efficiently store all communications between business and client in a central customer database.

## TEESSEN CONSULTING PROVIDES A TOTAL END-TO-END SOLUTION

*Contact Management is a central customer database  
shared by all the modules to provide you with a single view of your client.*

### FEATURES:

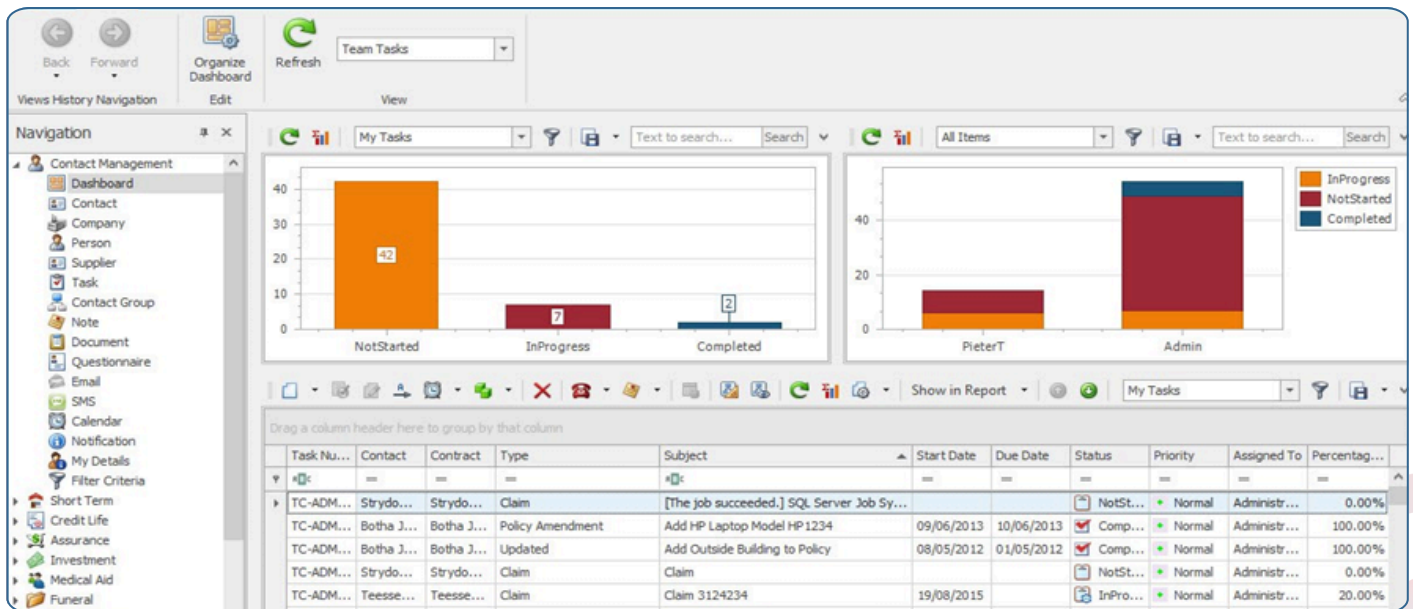
- Task Dashboards
- Client Networks
- Task Management
- Document Management
- Compliance and Questionnaires
- Reporting & Automation
- Integration & Workflow
- Distribution Lists
- E-mail Services
- SMS service
- Notifications
- Outlook Integration

### 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.



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## Task Manager

### TASK MANAGEMENT

Clear your desk from sticky notes and paper and create tasks linked to specific clients, their policies and product providers. Forward these tasks to the relevant persons and track task progress. Access to tasks and progress logs empower everyone in your office to service a client. Use defined templates to pre-populate the process and steps for a specific task type. Remember, if you can measure it, you can manage it.

### DOCUMENT MANAGEMENT

Are you still drowning in paper or finding it difficult to locate a document when you need it? Then you should start to store and manage these client data documents. References, keywords and documents linked to the client record, allow you to easily track and find what you are looking for. Store e-mails, documents, images, etc. in the database together with the client data.

### REPORTING & AUTOMATION

Use the Analysis tool to quickly and easily query data required for management information to make informed decisions, e.g. client demographic information, task progress or overall business performance. The Reporting tool allows you to build and generate standard reports on any data in the application which you can export or electronically send to the clients. Automated report processes can be created.

### INTEGRATION & WORKFLOW

At Teessen Consulting we understand the importance of the flow of data between systems in order to provide a holistic end-to-end business process. Our array of interfaces and services caters for 3rd party integration with our systems and provide various automation options. Contact us to discuss your specific integration requirements.

### FLEXIBLE IMPLEMENTATION

We offer a selection of application modules. We will gladly discuss your specific business requirements and provide a customised solution.

### INFRASTRUCTURE

We provide a Cloud based solution for both Windows- or Web application implementations. We can advise you on the most suitable solution for your business.

### TRAINING & SUPPORT

Effective product training can be arranged at your premises on the data familiar to your team. Our support team is available to assist you when needed.



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

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