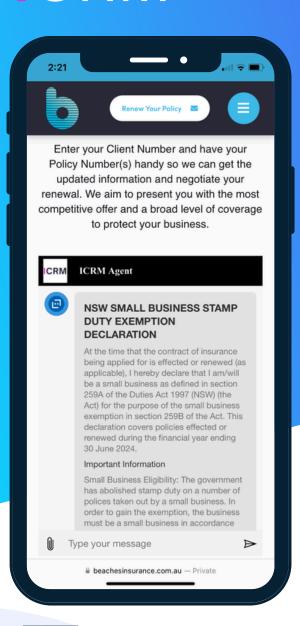
# CRM



It's the time saved that's the most noticeable improvement for us. Being able to focus on growing our business, rather than my team being tied up performing manual repetitive tasks. We're seeing a massive improvement in productivity and reduction in operational costs...

AMANDA HOLST DIRECTOR BEACHES INSURANCE NORTH SYDNEY



#### AI-DRIVEN POLICY RENEWALS

Claim back your time and gain more business by automating your client engagement and pre-renewal process.





## AI-POWERED CLIENT ENGAGEMENT

Al-driven client and policy tracking. Auto notifications and workflows. Spend less time in your inbox with a CRM solution designed for Insurance brokers.



### LET THE ROBOTS DO THE WORK

Reduce your manual repetitive tasks with end-to-end automated pre-renewals, client self-serve apps and dynamic document creation and rules.



## REDUCE CHURN. INCREASE SALES.

Gain more insights into client activity, spend more time onboarding new business.
Reduce duplicate data entry with seamless integration with back-end systems, compliance and industry portals.