

Microsoft Dynamics 365 Customer Service for Insurance



Unify Dots' CRM for Insurance for Customer Service is designed to help insurance providers evaluate and implement Microsoft Dynamics 365 Customer Service to modernize support operations, improve policyholder satisfaction, and reduce case resolution times.

Our Microsoft-certified consultants offer specialized consulting services to help insurance providers. We work closely with your team to:

- Assess current customer service challenges and opportunities
- Envision a future-state solution tailored to the insurance industry
- Explore capabilities such as automation, intelligent case management, and self-service tools in Dynamics 365 Customer Service
- Deliver a proof of concept or assessment to validate business value before any full-scale investment

This consulting engagement is ideal for organizations seeking to modernize customer support and make informed decisions about CRM adoption.



Unifying the Dots in your Business



Key Features

Unify Dots' CRM for Insurance for Customer Service provides:

1. **Comprehensive Policyholder View** – Access a 360-degree view of each policyholder, including history, interactions, policies, and claims in one place.
2. **Complaints Management** – Streamline complaints handling with automated case routing, escalation, and AI-driven knowledge suggestions.
3. **Claims Workflow** – Manage end-to-end claims processing from intake to resolution with document tracking and system integration.
4. **Service-Level Agreements (SLAs)** – Define and monitor SLAs for cases and claims with alerts for missed response or resolution targets.
5. **Self-Service Portal** – Empower policyholders to manage policies, submit claims, and get answers through a personalized online portal.
6. **Customer Surveys** – Gather feedback using automated surveys tied to service interactions to measure satisfaction and sentiment.
7. **Service Dashboards and Reports** – Track agent performance and service KPIs through real-time dashboards and visual analytics in D365.



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About Unify Dots

Unify Dots helps you connect the Dots by providing solutions that enable digital transformation. Unify Dots is a Microsoft Solution Partner specializing in Business Applications, Data & AI, Infrastructure and Digital & App Innovation.



Unify Dots has local presence in Asia Pacific, Australia, New Zealand, Europe, North America and operate in a global scale with a local touch. Unify Dots is also committed to improving the world and has pledged donating at least 25% of its profit towards the case of helping educate children from low-income families in developing countries.

Contact Unify Dots

Email us at info@unifydots.com to get more information on Dynamics 365 Customer Service for Insurance or contact us by calling one of our office locations or visit us at <https://unifydots.com>

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