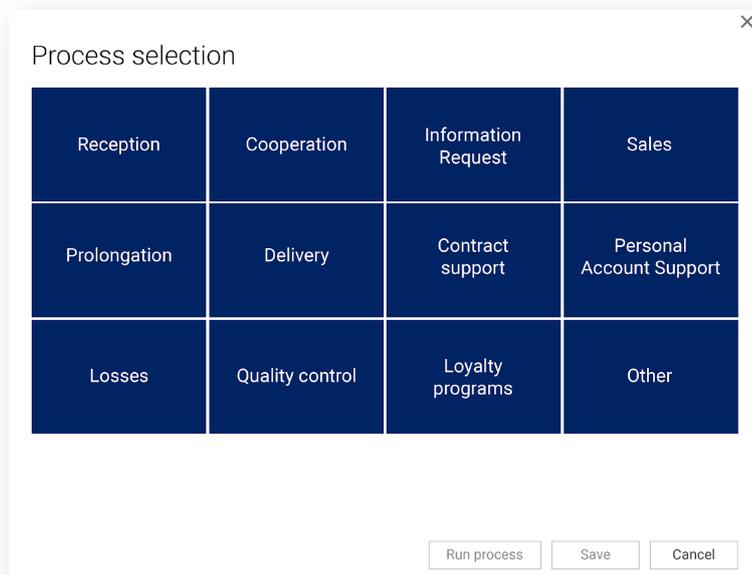


WaveAccess Dynamics 365 CRM Solution for Finance and Insurance



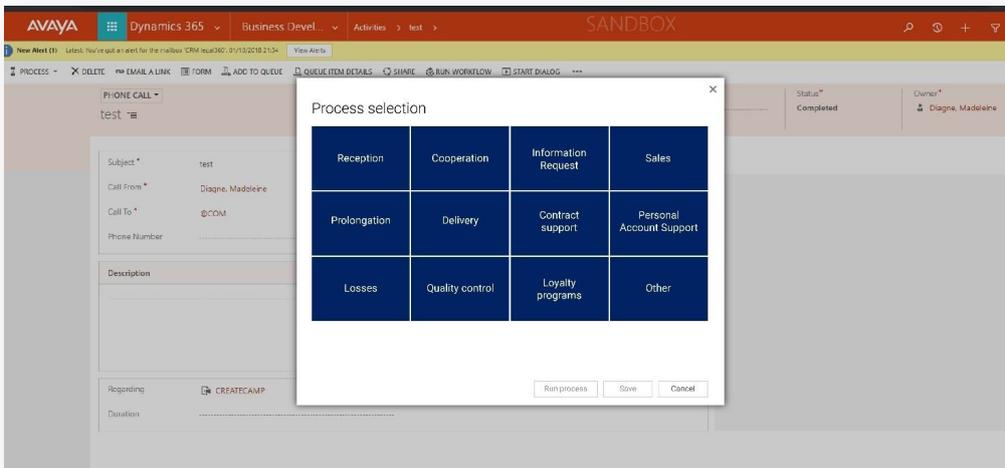
Solution: Unified workplace for financial and insurance companies, an omnichannel business app interface with automated and integrated business processes with Dynamics 365 CRM as a core system.

Features

- **Customized insurance products and solutions:**
 - Insurance contracts
 - Loss calculation
 - Insurance packages sales
 - B2B Insurance products
 - Claim management
 - Loyalty programs
 - Contracts prolongation
- **Single window for all customer interactions**
- **Task ranking: the incoming requests are processed and distributed according to agents' workload**
- **Production calendar: employee work schedule and time tracking**
- **Meeting scheduler.**
 - employees availability
 - meeting rooms booking
- **Real-time Outlook synchronization**
- **ERP Integration for full synchronization of financial activity**
- **Integration with Telephone system**
 - one-click calls right from CRM Interface
 - incoming call popups the CRM contact card so the agent can have immediate insights about the caller
 - if the number is unknown, CRM automatically creates a new customer card
 - call history and a link to an audio recording are automatically saved and available for further use
- **Knowledge Database right in CRM**
- **Delivery system integration**

| Our solution value:

- **Short time-to- market** (around 3 months, depending on the quantity of integrations)
- **Industry specific** – customized for Insurance and Finance, proven by Enterprise customers
- One vertical solution for employees, partners, clients and management board
- Total **transparency** of all communications with customers
- Every specialist's performance tracking
- **Revenue growth** based on improved targeting and more relevant offers thanks to customer history tracking
- Agents can focus on selling, not on formalities and processes



The solution is highly customizable and we will make it convenient for your particular business purposes.

Not sure exactly what you need? Let us lead you through a discovery session to help you accurately setup your project for success.

| About WaveAccess

19

years of delivering successful outcomes for customers

350+

talented & passionate professionals

20+

industry verticals from banking to healthcare

4

global R&D centres

96%

satisfaction index



2019 Partner of the Year
Media & Communications Award
2018 Partner of the Year
Artificial Intelligence Award
2017 Partner of the Year
Business Analytics Award



Gold Application Development
Silver DevOps
Silver Cloud Platform
Silver Datacenter

