



Challenges in broker management

On-boarding of brokers is slow and time-consuming

Old-fashioned processes are prone to human error

Broker information is scant and is often lost when the relationship ends

Brokers do not upload information as required

You cannot see all interactions with a broker in one place

There's limited availability of relevant KPIs

Each broker is unique so the process is not repeatable.

DXC Accelerator for Microsoft Dynamics 365 for Broker Management

Onboard brokers efficiently, track pipeline and performance, and improve relationships

Overview

Why Microsoft Dynamics 365 for Broker Management?

Insurance and financial services companies strive constantly to improve their unique relationships with brokers in order to sell their policies and products. Yet, their ability to achieve this goal is often hampered by manual and disparate processes.

Sometimes armed only with notebooks and spreadsheets, these companies struggle to manage the essential process of onboarding brokers and then lack essential visibility of KPIs such as performance by broker, percentage of opportunities that are won/lost and which brokers bring in good business versus bad.

DXC Accelerator for Dynamics 365 for Broker Management automates onboarding a broker to ensure compliance with FSA, reduce error and speed up the whole process.

Brokers can also upload their unique content directly through a self-serve capability to vastly reduce the overhead on processing information.

What's more, a centralised environment of brokers' opportunities enables more efficient pipeline management and forecasting.



The DXC solution replaces error-prone manual systems and disparate data records with a single view of all broker interactions.

It not only makes onboarding much faster and simpler, but also provides a centralised environment for more efficient pipeline management and forecasting.

Rapid deployment of the Broker Management solution

The DXC Broker Management portal is a cloud-based service that accelerates the process of onboarding and managing the broker/introducer relationship.

We understand your industry and market and have created a solution that provides vital functionality with minimal configuration, to speed up the onboarding of brokers/introducers to help you grow your revenue.

It significantly reduces the time you spend checking brokers' details before onboarding and eliminates the human error that can occur in manual checks and progress monitoring.

As experts in CRM (Customer Relationship Management), we know that this solution will serve to increase loyalty with brokers/introducers because it improves the way they interact with you. This means you will be able to respond much quicker to sales opportunities, making the whole business interaction smoother, more efficient and profitable.

The Accelerator aspect of the solution draws upon our significant expertise in the financial services sector and has been specifically designed to help customers reduce the time required to deploy a Broker Management solution.

Key benefits

With Microsoft Dynamics 365 for Broker Management from DXC Technology, you can:

- Have an automated broker management solution in place in weeks
- Automate onboarding to speed up the application process in areas such as checks and searches, ambit process, approvals and admin and broker ratings and risk
- Use workflow to expedite background checks to instantly assess brokers for compliance
- Offer your brokers a self-service portal to save you hours of internal administration time
- Take control of a centralised environment of brokers, business managers and their opportunities to provide accurate pipeline management and forecasting
- Enjoy access to business intelligence (BI) dashboards and tools to see an instant and easy-to-understand display of KPIs
- Be alerted automatically to any abnormalities or potential matters of concern
- Know which brokers are working on which opportunity and be assured that this information will be retained if key individuals leave.



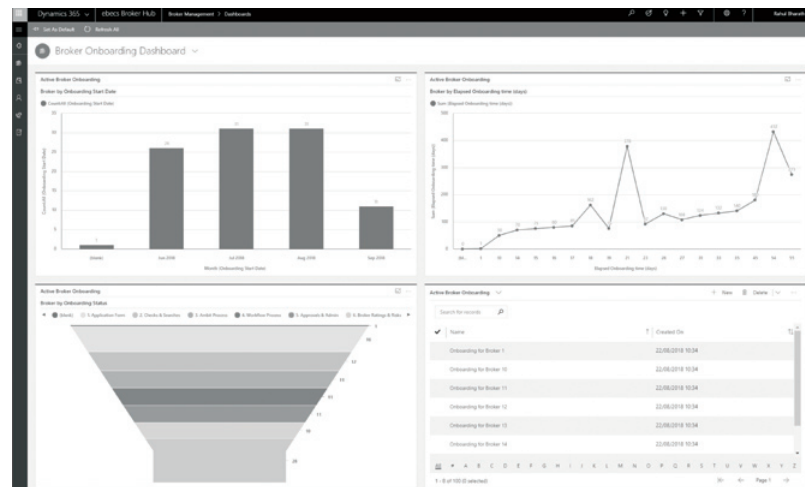


The DXC solution works the way you do, with easy access on mobile devices as well as on desktop, and with easy integration with other Microsoft solutions.

Ideal for direct-sales companies too

The solution works equally well in-house for your business development teams when companies manage client relationships directly, as it manages the pipeline and forecasting.

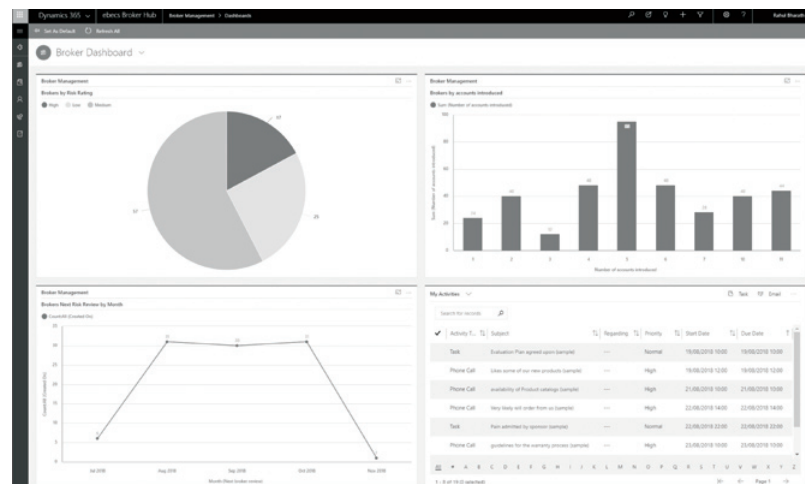
Key features that will transform your onboarding of brokers and broker management



With the DXC solution, financial services companies and brokers can maximise the profitability of each customer.

Features of our Broker Management solution include:

- Broker Portal access
- New Prospects (Leads) and Qualification
- Broker Onboarding and Broker Management
- Opportunity — Business Process Flow
- Activity Management (Emails/Phone Calls/Tasks)
- Competitors
- Reporting Dashboard.



The Reporting Dashboard

A Microsoft solution from a Microsoft Gold Partner

A Microsoft Gold partner, DXC is a specialist in delivering Total Microsoft Business Solutions. We can deploy Microsoft Dynamics 365 for Broker Management within your financial services business as a standalone system or integrate it with other Microsoft solutions, such as Dynamics 365 for Finance & Operations or Microsoft Business Intelligence.



Get in touch

Contact DXC and request a meeting with one of our broker management and financial services specialists for more information.

Visit ebecs.com/contact-us or call +44 (0)8455 441 441.

About DXC Technology and eBECS

eBECS is a DXC Technology Company specialising in Total Microsoft Business Solutions for financial services and other key industry sectors.

DXC Technology (DXC: NYSE) is the world's leading independent, end-to-end IT services company, serving nearly 6,000 private and public-sector clients from a diverse array of industries across 70 countries. The company's technology independence, global talent and extensive partner network deliver transformative digital offerings and solutions that help clients harness the power of innovation to thrive on change. DXC Technology is recognised among the best corporate citizens globally. For more information, visit www.dxc.technology.