

MS Dynamics CRM — Lead Management Solution

In the stiffly competitive insurance industry, leads come as a means for companies to promote business growth. However, prioritization of leads is dependent on a number of controlling factors and rules, and managing these optimally, to derive effective follow-ups, poses a challenge. Hence, insurance enterprises seek a solution that enables effective prioritization, eases the lead follow up process, reduces time, and facilitates the conversion of important leads into opportunities in a seamless manner.

Addressing your needs, we, at Tata Consultancy Services (TCS), leverage our Microsoft Dynamics CRM to offer you Lead Management Solution. Our solution provides the necessary workflow and routes the leads generated to the sales manager. This is then stowed in a repository of leads, which are quickly and effectively tracked to closure. As a result of this, you achieve better levels of profitability.

Overview

As your insurance enterprise strives towards increasing business conversion, you seek to monitor the progress of a lead at different stages to maximize its potential. Towards this, you seek to prioritize leads according to their conversion potential, track the lead status at different stages of progress, and facilitate quick response from the sales manager for lead acceleration. To support these successfully, you look for targeted promotional campaigns to spread awareness, as well as automated lead management. Automation not only eliminates manual intervention and resulting errors, but also minimizes the extra cost of tracking leads through phone calls and travel.

Offering you a ready accelerator to manage leads in MS Dynamics CRM 4.0, our solution enables automatic categorization of leads as 'hot', 'warm', or 'cold'. This is done based on criteria such as age, income, existing insurance, number of family members, and so on. Our lead management solution provides a portal for agents to create leads and track the status of the same. Automated workflows route the lead information to appropriate and efficient Sales Managers and are supported by dashboards that enable you to view senior management actions, with respect to the status of leads, at any instance. Hence, if managers generating the lead data do not follow-up efficiently, then the system enables senior management to track these leads and assign them to appropriate managers, who have the capability to follow up and guide the lead to closure. As a result, our solution enables quicker lead follow-ups, promotes closer relationships amidst stakeholders, and helps you to achieve higher business benefits.

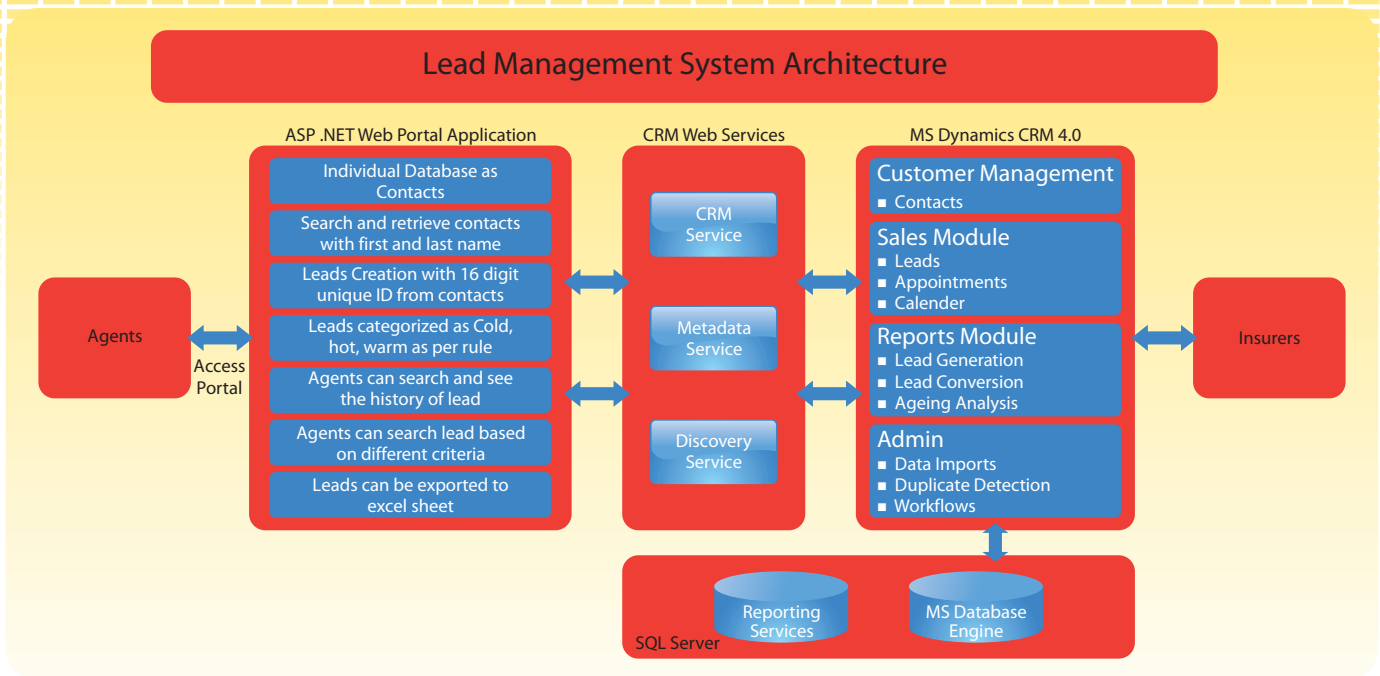
Our solution is accompanied by features such as:

- Agent portal for agents to login and create contacts and leads;
- Lead categorization, which classifies leads as warm, hot or cold;
- Automated workflows for mail notification and redistribution of leads;
- A duplicate detection rule for lead creation;
- Reports for lead generation, lead conversion, and lead ageing;
- Customized sitemaps to restrict visibility based on the user role.

Benefits

From automatic lead categorization and efficient lead tracking to guiding promotional campaigns, our solution enables complete and holistic lead management. Our solution also enables insurers and agents to view the leads assigned to them and various other reports associated with the leads for better analysis. Our solution brings in:

- The ability to gather lead information from various sources;
- Automated the lead management process;
- Automatic categorization of leads based on pre-defined parameters;



An overview of our solution

- The ability for Administrator to view and assign the leads to different agents depending upon the rating of leads;
- Automatic redistribution of leads to another agent if an agent is no longer active;
- An agent portal, which enables agents to track the lead status and follow-up with customers on a regular basis, thus reducing the delays in lead conversion.
- Rich user interface built on MS Dynamics CRM 4.0, which is user friendly and can be operated even with minimal training.
- 'Enterprise Solutions Microsoft Unit', which focuses on Microsoft Dynamics ERP and CRM solutions, has successfully executed several transformational programs, provides you advisory, implementation, and application management services.

Architecture

The main platform components are as follows:

- MS CRM 4.0 on Windows Server 2008
- Microsoft SQL Server 2008 database
- Web services and Reporting Services

Why TCS

We bring value to the engagement with our rich domain experience and knowledge, and proven experience in Microsoft Dynamics CRM Technology. Partnering with us, you gain from, our:

- Ready-to-deploy, browser-based solution, which ensures that no additional installations are required on end-user machines.

About Tata Consultancy Services (TCS)

Tata Consultancy Services is an IT services, business solutions and outsourcing organization that delivers real results to global businesses, ensuring a level of certainty no other firm can match. TCS offers a consulting-led, integrated portfolio of IT and IT-enabled services delivered through its unique Global Network Delivery Model™, recognized as the benchmark of excellence in software development.

A part of the Tata Group, India's largest industrial conglomerate, TCS has over 160,000 of the world's best trained IT consultants in 42 countries. The Company generated consolidated revenues of over US \$6.3 billion for fiscal year ended 31 March 2010 and is listed on the National Stock Exchange and Bombay Stock Exchange in India. For more information, visit us at www.tcs.com

Contact

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