## Vue

**powered by Vertafore**

A Vue Distributor Accelerator Suite Module

# Vue CRM for Insurance Distributors

Drive growth and manage the complexity of multi-carrier, multi-channel distribution with a robust, CRM application built for insurance distributors (MGA, FMO, IMO, and Brokers) who have outgrown their current tools. Vue's CRM offers unmatched flexibility and customization to support the uniqueness of each distributor's business module that features producer management, recruiting, lead management, 24x7 accessibility and advanced analytics.

*Vue CRM for Insurance Distributors integrates directly with Vue Contracting & Compliance and Vue Compensation. Vue CRM for Insurance must be purchased with at least one other module.*

## Producer database

Organize policies and producers by managing day-to-day tasks with other users on the Vue network, including brokers, IMOs, and home-office users in other locations. Segment producers based on your own characteristics and devise growth plans for each segment, create distribution strategies based on actual performance to support more informed decisions, and create customized incentives that enhance the overall producer–carrier relationship.

## Accelerate producer recruiting and expand new channels

Automate the entire recruiting process, from producer lead acquisition to contracting using paperless e-forms. The producer qualification process is completely customizable to your business needs and seamlessly manages data in the contracting process. Users have access to a comprehensive performance dashboard with detailed metrics of prospects and their activities, enabling them to pinpoint opportunities for improvement and growth.

## Built exclusively for insurance distributors

Vue CRM for Insurance distributors, in conjunction with Vue Contracting & Compliance and Vue Compensation modules, enables your marketing & sales operations to recruit, qualify, contract, amd implement complex distribution strategies, manage hierarchies, and automate reports, document, audit, and administer tasks. Vue CRM for Insurance is configured to each user's specifications, is mobile-enabled, and allows your distribution partners and producers to have 24/7/365 access to key information through a standardized producer portal.

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## Vue analytics

Make more informed decisions with access to real-time analytics, whether the data is the Vue platform, a third-party platform, or a homegrown data warehouse. Vue Analytics uses a proprietary reporting hierarchy to manage access to personal views that are important to you, facilitating actionable and intelligent insights that enhance operational effectiveness with a low- maintenance solution that leverages the latest in web services technologies and security.

## Lead & opportunity management

Access real-time, 360˚ views of your producers with interactive dashboards that allow users to manage their sales pipeline, track key performance measures, and measure other critical sales data such as premium growth, book of business, and retention ratios. Vue's producer relationship management feature provides pre-populated custom documents to suit all your needs.

### What our clients are saying about Vue

"Vue provided us with a solution that would fit well into our existing model and scale to meet growth expectations. The Vue team's understanding of our business and experience in implementing solutions for other managing general agencies are major factors that prompted our decision."

Penn Global marketing

"Vue provides a solid solution for the insurance industry"

CRM

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**Two management plans to choose from and modernize distributors**

## Contact management

### Contact management

- Sales record management
- Sales meeting note sharing
- Critical life events and interests
- Service request tracking
- Capture notes and call reports

### Work management

- Tasks and activity tracking
- Calendar management
- Document upload
- Reporting
- Custom document creation
- Email "mail merge"
- Document storage

### Sales reporting

- Book of business database of polices
- Active policy measurements
- Key performance metrics tracking: total revenue per policy, book of business, renewals and retention and loss ratios, etc.

### Sales opportunity management

- Lead management and duplicate detection
- Lead and opportunity tracking
- Opportunity reporting and dashboards
- Sales KPI dashboards
- Sales call reports

### Recruiting

- Producer prospect pipeline management
- Recruiting dashboard
- Social media insights
- Producer qualification

## Performance management

(Includes Contact Management plan*)

### Performance management

- Track both monetary and non-monetary goals and performance to date
- Enhanced producer relationship (meeting notes, call reports, etc.)
- Service requests
- Production reports

### Custom sales workflows

- Customized sales process rules
- Streamline administrative processes
- Automate work distribution
- Sales trend analysis
- Unlimited related objects and entities
- Content library
- Integration with Marketing Automation Systems

### Vue analytics

- Sales performance reporting with targeted KPI's
- Profitability analytics
- Producer segmentation by category
- Producer run rates, sales, policies and loss tracking
- Customizable dashboard creation
- Compensation and incentive dashboard

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**\*Requires producer self-service portal**

*Give your producers 24/7 capabilities to
maintain their compliance information*

- Activity views
- Reporting
- Service requests
- 24/7 profile updates
- Task management
- Producer specific dashboards

## Vue Components

### Integrations

- Marketing automation systems
- Compliance systems
- Policy admin systems
- Document management systems

### Producer database

- Producer profiles (accounts) with demographics
- License and appointment framework
- User defined fields and entities

### Tools to automate the work
(Requires performance management plans)

- Graphical workflow and questionnaire designers
- Form designer with branching
- Letter and email generation

### Hierarchy management

- Unlimited hierarchies
- Reporting and commission hierarchies
- Book of business transefers

### Communicate and approve with ease

- Follow-up and submit requests for approval
- Email links or documents one at a time or in bulk
- Automatic tasks and emails based on parameters you set

### Tools to simplify the work

- Work que metrics and dashboards
- Personalized queries and results
- Audit trail down to the field and user level
- Upload documents
- Exception tracking and escalation
- Add notes at producer or credential level
- Create and support all digital applications

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