



FIDO

Sales Workflow Management: Enhanced Client Relationship Manager & Workflow Management System

InsureZone's modular platform provides flexibility to customize the sales and service workflow for your operation.

Start with the complete suite of tools or add products and services as you need them over time. From altering your web presence to accessing the back-office tools that will improve your organization's efficiency; you can manage your entire operation with tools branded for your company's look and feel.

FIDO's Capabilities:

Submission management CRM guides each lead through the quoting and binding process.

Customizable work queues automatically assign tasks to the proper employee or department for handling.

Integrated real time rating for personal and commercial lines of business, using your own independent carrier contracts or InsureZone's wholesale contracts.

Integrated calendar and e-mail functionality keeps a permanent record of all communications and reminds producers when it's time to follow up on a lead.

Document management tools store e-mails, application changes, reports, supporting documentation and more.

Track sales and issue policies using a simple SSO connection to a carrier's site where a quoted lead is waiting for follow up. Once a policy is bound, maintain accurate policy records, with the help of AL3 file integration.

