






# WYNSURE SALES AND BROKER MANAGEMENT



Wynsure Sales and Broker Management Solution is a robust sales management solution focused on monitoring and visualizing insurance sales performance. It supports business growth, marketing, and effective distribution. This solution enables the producer management and compensation function for insurance carriers, bringing mature analytics capabilities.

## Business Imperatives and Market Challenges

 <p><b>Regional Head</b></p>	<p>“ How can I monitor and manage effectiveness of distribution network– brokers/agents”</p> <p>“I want to correlate sales performance (wins and losses) with efficiency across functions – rating, proposal, underwriting and enrollment ”</p>	<p>“I want to see how different brokers are performing across three markets that I supervise”</p> <p>“I want to see if their incentives are aligned to my sales goals ”</p>
 <p><b>Sales Head</b></p>	<p>“I wish to monitor effectiveness of individual sales managers in my division”</p> <p>“How do I make sure we maintain a lower loss ratio? Are agents selling products at the right price or selling to the right group? ”</p>	<p>“I want to dynamically monitor pipeline status and deal movement across the sales funnel”</p> <p>“Why our conversion ratio is lower than other market regions – is our pricing right? Is our enrollment system efficient?”</p>
 <p><b>Sales Manager</b></p>	<p>“I want to monitor how agents are performing in my area?”</p> <p>“How do I measure effectiveness of marketing campaigns in my area?”</p>	<p>“How can I see return on my investment in indirect sales – broker commissions, marketing cost and support system cost etc? ”</p>

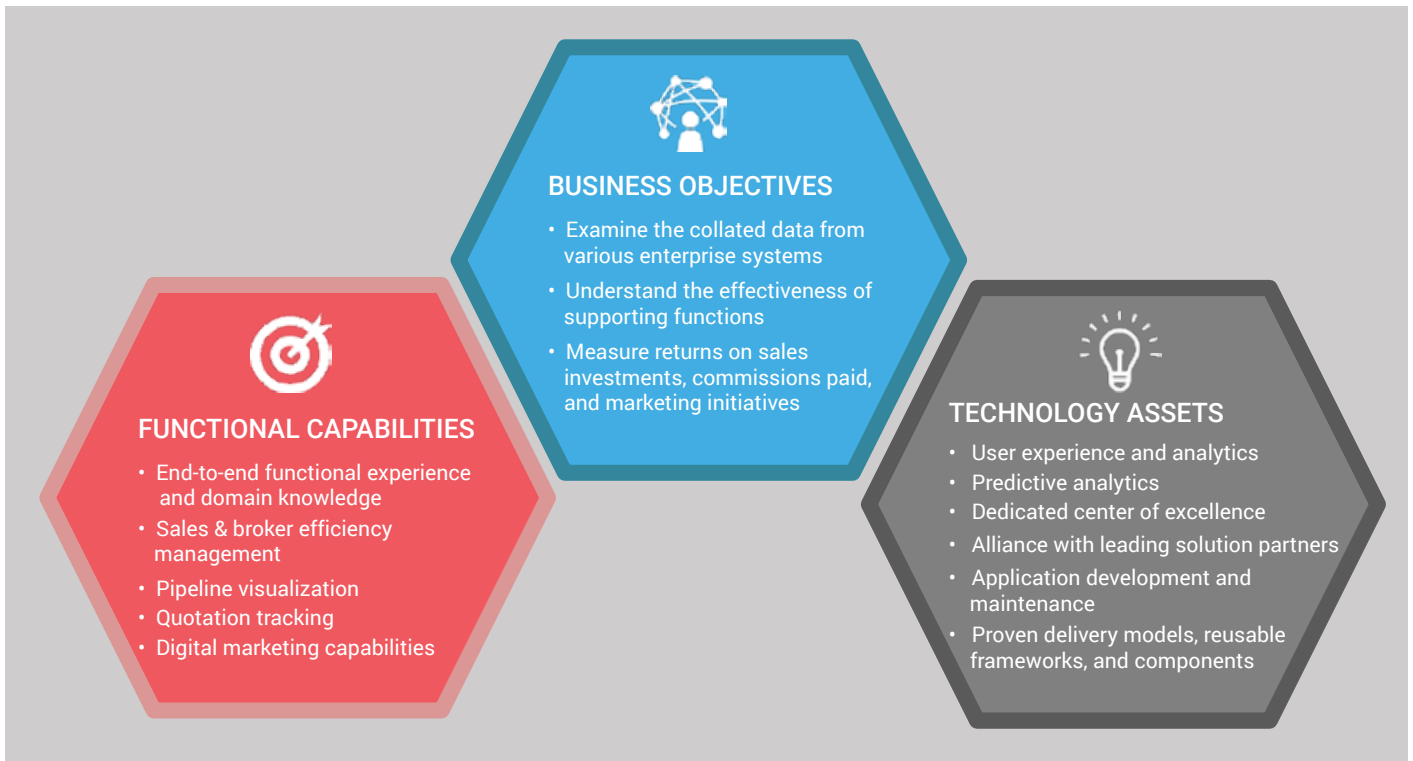
# Introducing Wynsure Sales and Broker Management

Wynsure Sales and Broker Management Solution is a part of the Insurance Front Office Solution Suite. It works on top of the CRM and policy admin systems to generate meaningful insights for sales operations and broker (distributor) management. The solution generates customized reports for tracking and monitoring by viewers, enabling them to deep dive into functional processes to identify problem areas. The solution enables viewers to clearly track the effectiveness of sales efforts, marketing initiatives, and functional modules interacting with the sales process (e.g., quote generation, pricing, and underwriting).

The solution enables carriers to manage sales through brokers or agents through in-depth reporting of indirect sales across producers, markets, products, and territories. It provides an analytics window to dynamically monitor sales, track profitability, and identify points of inefficiencies. Beyond sales management, carriers get a view of commission's distribution, incentive structure, and ROI across producers/distributors.

Typical dashboards generated by Wynsure Sales and Broker Management Solution are:

- Insurance sales and broker efficiency
- Revenue and profitability across product portfolios
- Customer/account-based performance
- Role-based reporting
- Sales forecast
- Loss assessment

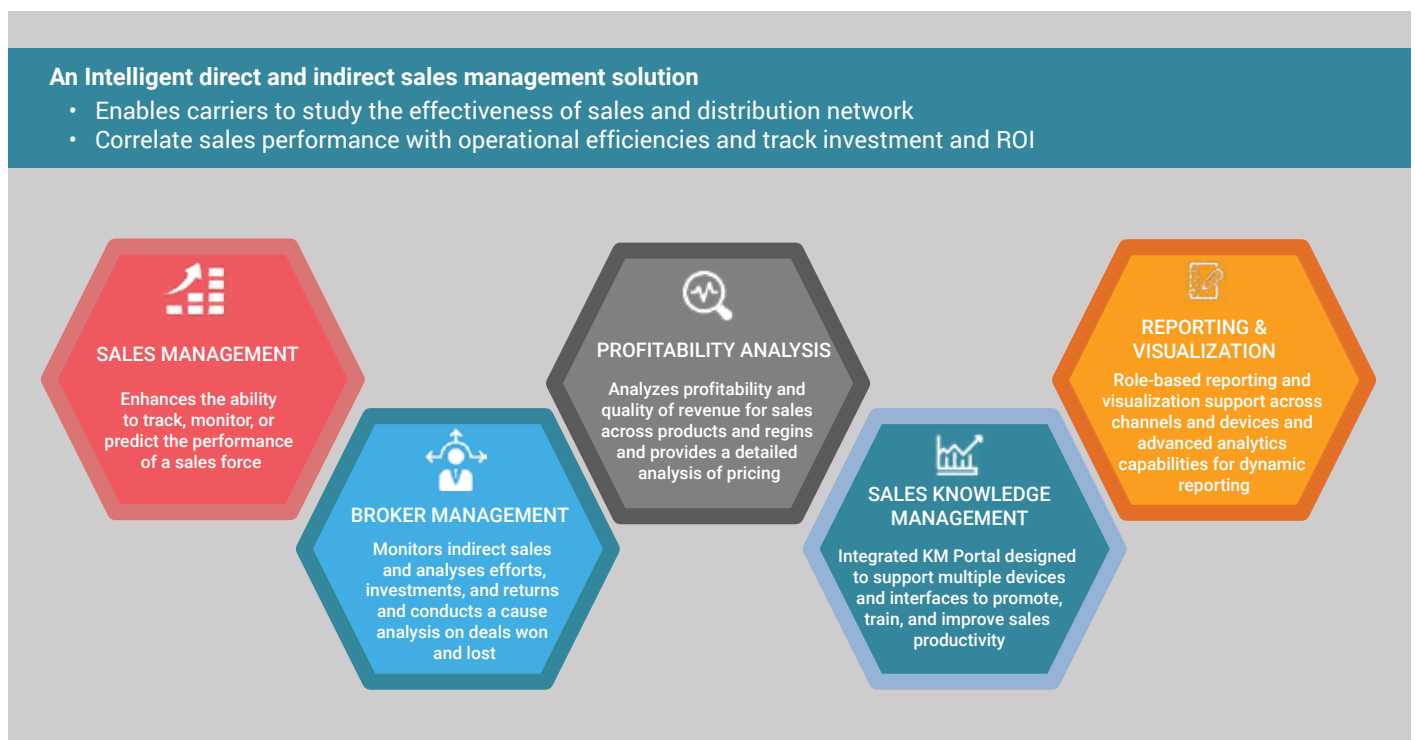


# Inside the Wynsure Sales and Broker Management Solution

Wynsure Sales and Broker Management Solution tracks data through the insurance sales process from customer outreach to onboarding. The solution sits between CRM and policy management systems and integrates data from multiple sources across the organization to generate meaningful insights for sales performance. Based on roles, stakeholders get access to important indicators, detailed data across the sales systems, and associated functional modules to monitor impact on overall sales performance. Below is the functional diagram explaining how this solution interacts with different functional modules across the system.

## Features and Benefits

The Sales and Broker Management Solution provides capabilities to track and manage sales data, create dynamic reports, and generate meaningful insights as well as create a customized experience for each group of stakeholders—sales managers, brokers, agents, and individual sales persons. The strength lies in its capability to integrate and manage data across multiple enterprise systems and generate relevant insights for each stakeholder involved in the process. It can also offer predictive analysis along with detailed reporting and custom



### ABOUT WYDE

An Mphasis Group Company

Wyde is a market leader in policy administration software & solutions for group life & supplemental insurance. We are the creator of Wynsure, a proven software platform, at many of the leading insurance carriers in North America and Europe. We are headquartered in Bloomington, Minnesota, USA, with offices in Canada and a modern Research & Development center in Paris, France. Wynsure is a multi-language, multi-currency, easily configurable software product that offers end to end business solutions in hosted & cloud environments for the Group Benefits market. More information is available at [www.wyde.com](http://www.wyde.com)

### ABOUT MPHASIS

Mphasis is a global technology services and solutions company specializing in the areas of Digital, Governance, Risk & Compliance. Our solution focus and superior human capital propels our partnership with large enterprise customers in their digital transformation journeys. We partner with global financial

For more information, log on to  
[www.wyde.com](http://www.wyde.com)



VAS 19/04/17 LETTER BASIL 4348

[www.wyde.com](http://www.wyde.com)

