

# Group Benefits CRM



## Group Benefits CRM QUICKVIEW

Sell more in less time, differentiate your firm with exemplary service to your clients, and improve internal communications and efficiencies. **Group Benefits CRM**, designed by benefit brokers for benefit brokers, combines the power and familiarity of Microsoft Dynamics CRM with the information needed by and business processes of group benefit agencies. **Group Benefits CRM** gives you the choice of a subscription-based version or keeping your system on your own server. In either case, **Group Benefits CRM** is available right inside Outlook, making adoption easy. When you are away from your computer, **Group Benefits CRM** is available on the web from any location. Implementation is quick, and customization to meet the unique needs of your organization is not only possible, it is encouraged. **Group Benefits CRM** is the sensible, cost-effective system producing immediate, measurable benefits that increase the more you use your system.

### Managed Data:

Clients	Policies	Opportunities
Contacts	Renewals	Seminars
Leads	Products/Services	Projected Revenues
Members	Issues	Activities
Vendors	Marketing Campaigns	Communications

Having a central location to store and share data improves communication and coordination of efforts, but the real benefit comes in reporting and manipulating the information. **Group Benefits CRM** excels. Here are a few samples of QuickViews and built-in reports. Each can be filtered and easily customized to your requirements. **Group Benefits CRM** offers Click to Excel to instantly convert any QuickView to a static Excel worksheet, an automatically updated dynamic Excel worksheet, or an Excel Pivot Table. Additional built-in reports provide grouped and formatted data for presentation. The following is just a sampling:

### Reporting

#### Clients:

- Stewardship - Summary
- Stewardship – Detailed
- Client Overview
- Clients by Producer
- Products/Services Used

#### Renewals:

- Renewals Next 3 Months
- Each Calendar Month
- Renewals by Producer

#### Opportunities:

- Renewal QuickViews
- Open Opportunities
- New Business
- Opp Activity by Producer
- Competitor Win/Loss
- Sales History
- Sales Pipeline

#### Knowledge Base:

- Top Articles

#### Issues:

- Issue Status Report
- Active Issues
- Resolved Issues
- Issues by Acct Manager

#### Marketing:

- Targeted Lists
- Campaign Performance
- Leads by Interests
- Seminar Attendees

### Additional Points of Interest:

- ❖ Group Benefits CRM is available as a hosted solution or installed on your network
- ❖ Group Benefits CRM is web-based so you can access your data anywhere, anytime
- ❖ Group Benefits CRM is fully functional “out-of-the-box”, but is easily customizable to meet your unique requirements
- ❖ Group Benefits CRM rests on Microsoft Dynamics CRM, so you get the best interface with Outlook, Excel, and Word
- ❖ Group Benefits CRM Workflows automate processes, send emails and letters, schedule callbacks, notify users when actions have been or need to be taken
- ❖ Group Benefits CRM is produced by Power Time Corporation, a Microsoft Certified Partner specializing in client management software since 1988.

**For more detailed information or a personal demonstration of Group Benefits CRM,  
contact Susan Eckles at Power Time**

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marketing, and customer  
service processes  
into easy systems that work.*

