

SmartOffice Pro



CRM for Insurance Professionals

Australia's leading insurance software provider, Ebix, has developed SmartOffice Pro, a CRM that meets the sales and marketing needs of insurance brokerages, agencies and advisors. It has a unique set of key features built to enhance marketing and sales efforts, allowing your business to stand out from the crowd.

SmartOffice Pro has been designed for insurance professionals by insurance professionals. It integrates with Ebix broking software and includes policy and case management within its features. Microsoft Office has also been integrated, further extending the usability of SmartOffice. Its user interface can even be customised to your liking at no extra cost. Find out why 125,000 insurance professionals choose SmartOffice as their CRM solution.

How it Works

Business Organisation

By establishing a central point of client information, a 360 degree view of your entire business can be accessed and maintained. Your database will be transformed into a manageable and sharable framework.

Marketing and Sales

With clarity and detailed contact information, identify, manage and act upon opportunities with new and existing clients.

Customer Service

Customer Relationship Management software has the ability to consistently guide staff in delivering outstanding customer experiences, retaining happy clients and generating referrals.

Reporting

The ability to create real-time dynamic reports can bring unprecedented clarity to your business. Clarity can lead to more informed, smarter decisions.

Compliance & Auditing

SmartOffice Pro automatically tracks and maintains a comprehensive record of all client and prospect interactions for compliance and auditing purposes, saving time and effort.

Features

- Web-based
- SmartOffice Anywhere mobile interface
- Policy-tracking
- Dynamic real-time reporting
- Ebix broking systems integration
- Microsoft Office Integration, Exchange based, including email integration
- Customisable user-interface
- Streamlined intuitive design
- Supported by Chrome, the world's most popular browser

SmartOffice Features

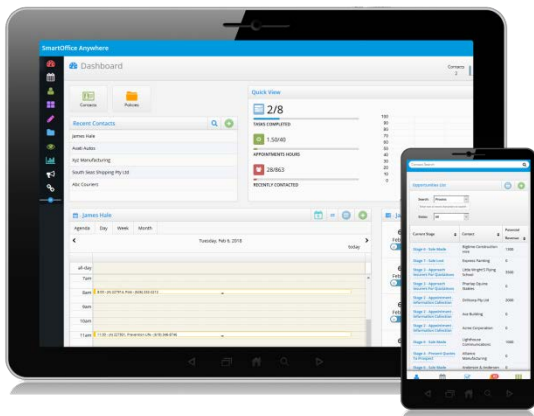
Web-Based

There are many advantages to a cloud-based CRM. Not only is it significantly lower in cost than a traditional on-premise CRM but it is also much more flexible, allowing the software to scale as your business scales. Cloud-based also means that the software is accessible anywhere at any time.



SmartOffice Anywhere

SmartOffice Anywhere is the mobile enhanced version of SmartOffice Pro. It has all the features a customer-facing broker needs, and nothing they don't. Its simplified design delivers an effortless and efficient user experience, perfect for those on the road and out with clients.



Policy-Tracking

Clients' policies can be entered, tracked and reported on. It provides visibility into all types of policies and lets you view policy information globally or by individual client. Be alerted when a policy needs to be renewed, or create a report that identifies additional policy opportunities.

Email Integration

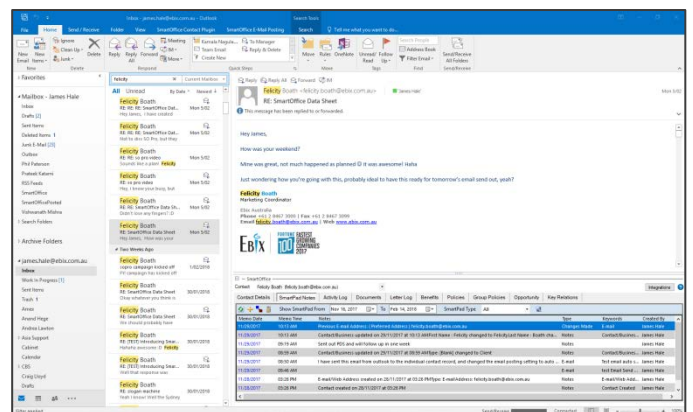
One of the top benefits of SmartOffice Pro is its ability to send individual or mass emails from within the program. SmartOffice also integrates with Microsoft Outlook. This allows SmartOffice to retain a complete email history on each individual client without any effort from the user. If your client's preferred method of contact is postal mail, this is also managed out of SmartOffice, and saved to the client's account for later reference. Contact management is effortless with SmartOffice Pro.

Dynamic Real-Time Reporting

The reporting capabilities of SmartOffice are almost endless. If the data has been entered into SmartOffice, then you can report on it. Users are able to easily create standard and custom dynamic reports, providing transparency and opportunity for improved control. From the amount of sales activity taking place, to outstanding tasks, upcoming renewals or new business, brokers and managers can gain an understanding of where to focus their attention. To simplify the reporting process, reports run in SmartOffice can be exported directly into Excel.

Microsoft & Ebix Integration

Ebix has developed a CRM that can sit seamlessly within your insurance company. SmartOffice integrates with Ebix broking systems; Ebix OneOffice Life Insurance Platform; as well as Microsoft Office, establishing technological flow within your office.



Using the Microsoft Exchange Server, outgoing and incoming e-mails are automatically saved to each client's account. This provides a comprehensive communication history in SmartOffice, without requiring any effort. Being Exchange based synchronisation, emails,



appointments and tasks can be synchronised to SmartOffice from any application that uses your Exchange account.

A recently added feature is the ability to view SmartOffice data through a window within Microsoft Outlook. When a client emails through, you don't even need to leave Outlook to view client history and their active policies, the information will be displayed underneath the email.

Data can be conveniently imported using excel. And branded email templates are designed within Word and saved to SmartOffice for sending to individuals or the masses.

Policy information can be pulled across from Ebix broking systems into SmartOffice in a read only format. Users are able to create reports, set reminders, and uncover cross marketing opportunities for clients' policies.

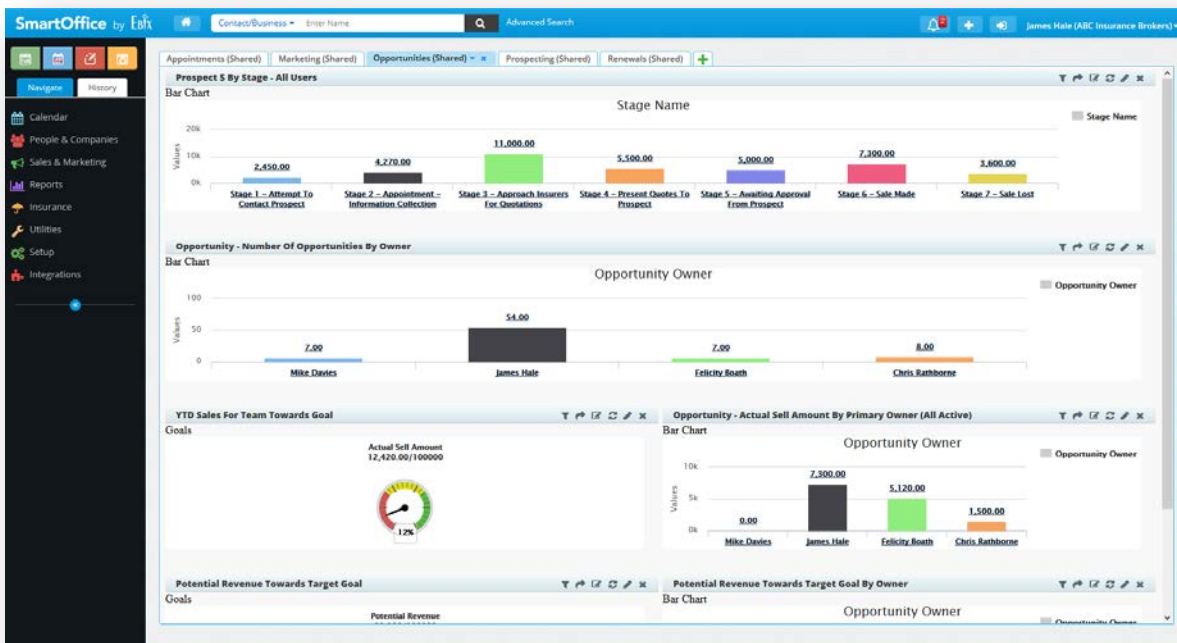
Manage Sales Pipelines

Come closer to certainty by using the SmartOpportunity module. While your business may already have established workflows and

processes, they may not be meticulously followed. By creating Opportunity Processes you can ensure your staff take the necessary actions at the most relevant stages in the sales process to ensure client service standards are met. It even goes as far as to have specific time of the buyer's journey. Opportunity Processes provides guidance to your team and give you better control over the sales pipeline.

Marketing Campaign Management

Marketing activities can be managed and reported on through SmartOffice. Create whole marketing campaigns based on information gathered from reports and lists. For example, if you were looking to target a particular type of customer, you could pull a list based on this information and send a letter, email or call the contacts on your list. If you were to engage in marketing activities such as these or other forms of advertising and marketing, you can then report on their success. Simply by entering data on how your clients heard about you, you could determine whether your campaigns were





successful or not. Your future marketing decisions can then be made with insight.

Customisable User Interface

SmartOffice is a very flexible CRM, built to work with your business model and not the other way around. One of its flexibility highlights is its customisable user interface. By choosing your own layout you can save time on searching for options you use regularly and focus on what is really important to you. Immediate access to the information that you need helps you get the most out of your SmartOffice software.

Why SmartOffice?

Used By 125,000 Insurance Professionals Worldwide

Find out why SmartOffice is the CRM solution for the insurance industry for over 20 years, across the globe. Contact Management is at the core of its design, delivering a CRM that is flexible and scalable. SmartOffice works with your business and not the other way around.

You Can Trust Ebix

Ebix has been developing software solutions for the insurance industry for almost 40 years. By keeping our clients at the focus of what we do and working in partnership with some of the world's best insurance professionals, Ebix has grown to become Australia's leading supplier of insurance software. You can trust that Ebix knows the insurance industry like no other software company.

Made For Insurance

SmartOffice was designed for insurance professionals by insurance professionals. Its features include policy and document

management, case management, as well as a complete and permanent audit trail.

Low Commitment

Unlike many other CRMs, SmartOffice has a small initial commitment. We're confident that you will see the benefits that SmartOffice can bring your business. In the unlikely case that you aren't happy with it, you are free to unsubscribe at any time after 3 months.

What You See Is What You Get

SmartOffice pricing offers great value and flexibility. We've included the core functions in the base price, so there are no nasty surprises. Should you want to add extras, you will only pay for those users who will make use of them.

User Support

At initial purchase of SmartOffice we offer online product training via Webex. Online training allows for individual or small group training from the comfort of your own office. The training is conducted by a SmartOffice consultant and can be customised to your requirements.

There is an extensive amount of training videos for easy and convenient learning. This is available online from within the SmartOffice program under Help & Training menu.

A SmartOffice user guide is also available for download via the Help & Training menu.

For any other issues our support team can be reached on +61 2 8467 3000 or support@ebix.com.au.