

Insurance Policy and Client Management System

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Abstract— This paper focuses on developing the Customer Relationship Management (CRM) for insurance sales agent. Thus, we reviewed countless specialized papers addressing regional and international options for client relationship management. We focus on insurance sales agent to manage all her clients and client policy and create safe, secure, user-friendly, and flexible system. Track customer policy. Ex., we can see when client policy will expired.

Keywords: Customer Relationship Management, Policy and Client Management Technology

I. INTRODUCTION

An insurance policy and client management system is an India's #1 Cloud Based SaaS (Software as a service) Platform. It tracks details of the customer policy, Manage different type of policy and Manage different type of policy. Not just this, but it additionally helps in managing claims for customers and managing commissions for the agents. It Auto coverage premium and expiry reminder.

Main purpose here is to design the management system for easy to hand all data. And maintain properly records.

More and more insurance agent want an effective way of automating routine tasks and managing their book of business. They are also using technology based software products to handle daily operations. Policy and client management software is a digital tool that helps life, health, and property & casualty insurance agent automate their day-to-day tasks and make operations more efficient.

Here are the key features of Insurance Policy and client management system CRM that make all data manage more efficient:

- 1) Lead and customer relationship management: it is a core functionality of CRM software, and no other software can handle client relationships better than system.
- 2) Cloud-based SaaS (Software as a Service) platform: cloud hosting allows your agents to work smoothly even while working from home. Plus, cloud-based system for agent policy and client data security.
- 3) Contact management: System ensures that the agent policy and client data is organized in a clean, efficient, and easy to understand manner.

- 4) Workflow automation: by automating routine tasks, system can help agent work smarter and achieve more in less time.
- 5) Client policy expire record manage: This system provide facility to auto policy premium and expiry reminder.
- 6) Automated reports: agents need not spend hours fetching data and building reports. The system automatically generates individual/team performance reports, reports on policies sold and report of client etc.
- 7) Automated revenue calculation: This system automatically calculate monthly and yearly revenue.
- 8) Automated commission calculation: This system automatically calculate monthly and yearly commission.

II. LITERATURE SURVEY

In circumstances where we have a performing computer system recording and managing insurance policies, we can develop specific applications, that are necessary in the internal analysis of each policy and client taking into consideration its activity and can be used to analyze the volume of the gross written premiums, commission amount etc. The utilities of applications developed for the client portfolio underlie the development of the client care activities.

Among these we mention:

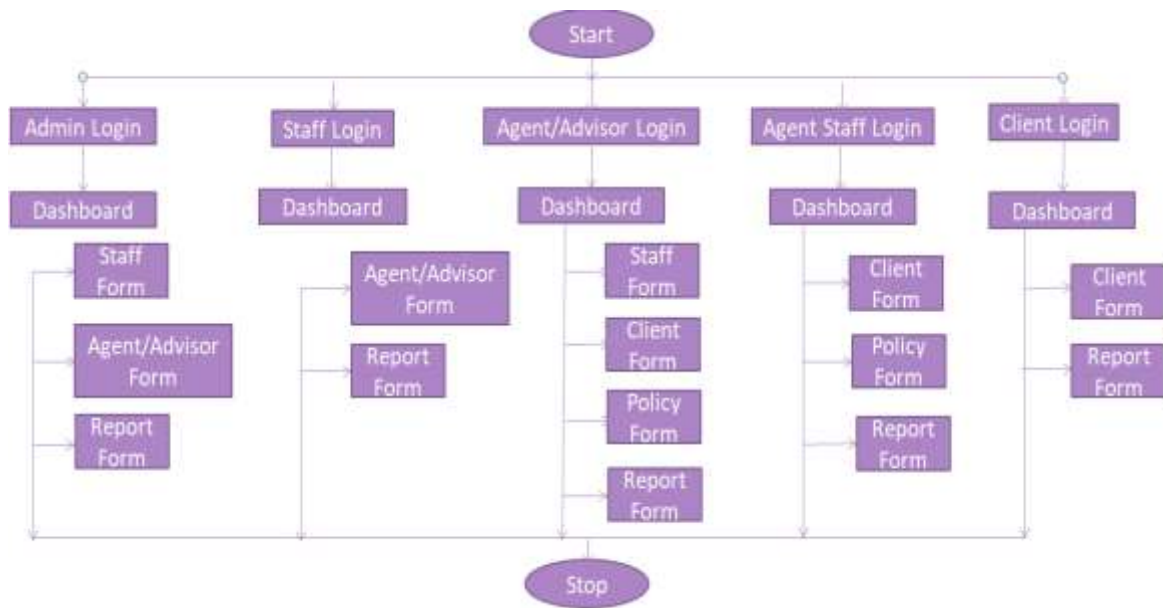
- Client notification services on payment deadlines and renewal of insurance policies.
- Services to providing facilities for see all record monthly and yearly.
- Monthly and yearly commission and revenue calculation.

A particularly important benefit for the insurance agent, resulting from these specific applications, is the possibility of identifying profitable client considered according into policy.

III. METHODOLOGY

This is focus to create India's #1 Cloud Based SaaS (Software as a service) Platform for managing all agent insurance policy and client data with security.

IV. SYSTEM FLOW DIAGRAM



V. CONCLUSIONS

This Insurance policy and client management system CRM is a powerful tool, but it remains just a technology that cannot yield results by itself and it needs someone to know how to use it. Managers often used the CRM system to gather information about their client and client policy. No count number how properly implemented, the client relationship administration device can't change a stable strategy, focusing on the client. In fact, such a method have to already exist when imposing System.

Regarding the insurance agent it has been often accused of being reluctant to change. It must however be noted that this policy and client data is built on the notion of risk management. Avoiding excessive risks, insurers make profit by investing the client's money therefore the reluctance to risk is exactly the thing that characterizes them.

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