Insurers are realizing they need to treat agents like customers. This is a two-part process: insurers need to better enable the agent to sell their products and services, and they need to help the agent to develop.

Increasingly, insurers are looking to pull together data and deliver a comprehensive view of their agents, giving them a clear picture of how they can best support them.

In addition to staying informed on the performance of agents, insurers want to develop relationships with their strongest performers and provide the resources that will enable all agents to sell more. The Microsoft distributor relationship management (DRM) solution helps insurers connect disparate data systems and gain the insight needed to improve the efficiency and quality of broker relationships. The solution helps streamline operations through better knowledge transfer on customers, products, and services, and empowers agents with real-time insight into sales performance across the broker network. As a result, insurers are able to better support the channel and make it easier for agents and brokers to sell their products.
**Improve agent retention and increase loyalty**

Make it easier for agents to do business with you, helping increase agent retention and loyalty. Provide the support your agents need to enrich customer relationships and be more productive by making data available through familiar tools and accessible on any device. Supporting the channel to be more profitable and productive can help you increase agent loyalty, resulting in more business written back to the company.

**Stay informed on agent performance**

Develop relationships with your strongest performers, while enabling real-time insight into sales performance across the broker network. For example, territory managers can quickly identify the agents in their territory that are above or below the stated goal for the year, providing a better picture on how they can best support them going forward.

**Improve adherence to regulations**

Mitigate risk by monitoring the activities of agents to ensure compliance with industry regulatory standards. Review sales reports and identify inconsistencies that may require investigation.

**The distributor relationship management solution** enables insurers to better manage their agent-broker distribution channel, increasing agent loyalty and helping them win greater share of the business.

**Help agents sell more with new leads**

Help agents sell more of your products and services by providing new leads. Target brokers who have profitable accounts and cross-sell other products to them. Help agents turn leads into revenue by providing the latest product and services information through familiar tools, anywhere and anytime.
Solution overview
Distributor Relationship Management

We can help you build strong partnerships

Marketing
Sales
Service

CRM
Aggregate all your data locked away in disparate systems, putting it in the hands of the people who need to act on it.

Stay informed on performance
Get real-time insight into sales performance and develop relationships with the strongest performers, while improving adherence to industry regulations.

Help your agents sell more
Provide your agents with new leads and information and resources, increasing agent loyalty and winning you a greater share of business.

Enable your agents to seamlessly engage with you whenever, wherever they want.
Why Microsoft

Microsoft is empowering insurers to deliver higher-value experiences, helping them win back loyalty and thrive in the digital age. This is driven by solutions that enable insurers to engage customers across channels, enable a connected and collaborative digital workplace, and transform into a digital business with connected and open systems.

**Productivity.** Enable your agents to seamlessly work across tools they use every day. Get the power of Microsoft Skype for Business, Yammer, Office 365, and Power BI all natively built into Microsoft Dynamics CRM.

**Insurance industry experience.** The Microsoft advantage is a complete platform developed by a vendor with decades of industry relevant experience.

“The exciting thing for me is equipping our sales staff with a great, intuitive system and seeing them really motivated to go into the brokers and make more sales.”

*Phil Bunker*
Managing Director

“IT’s amazing that you can reduce deployment time by more than half as a result of always having available the necessary infrastructure from Microsoft.”

*Sandra Lopez*
IT Director

AXA Belgium implemented the Distributor Relationship Management solution on the Microsoft Azure platform to replace a manual and obsolete claims management system—without procuring costly hardware.

LV implemented the Distributor Relationship Management solution on Dynamics CRM to manage their entire broker network, enabling their staff to have a comprehensive 360-degree view of their relationship with their brokers.