



## Features & Benefits

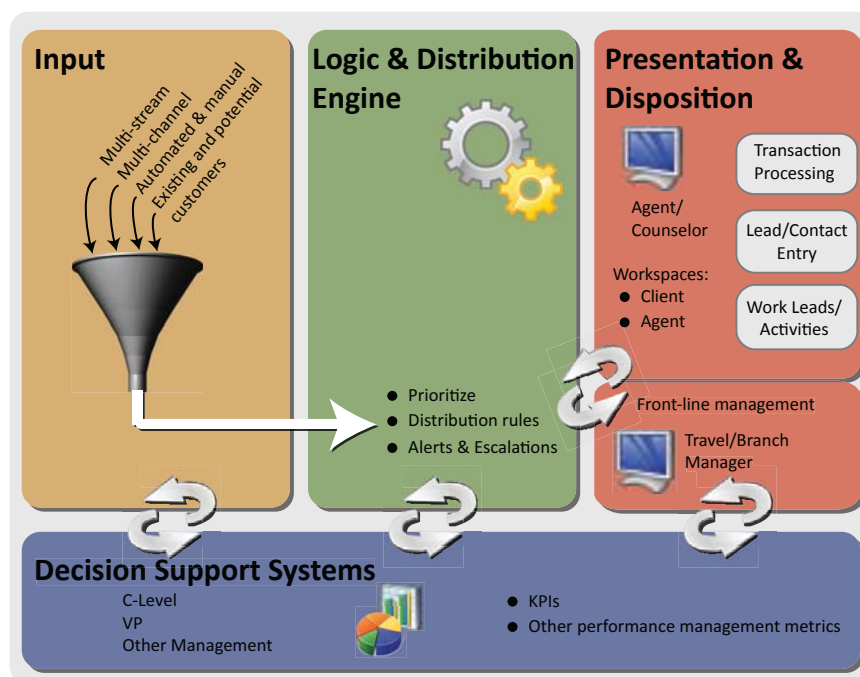
- › Makes effective use of front-line staff, promoting a proactive approach to generating new business
- › Enables your club to gain greater share of wallet, and leverages and strengthens the customer relationship
- › Captures information vital to properly handling leads for all business lines, and the overall management of the leads process
- › Provides support for handling bulk load, such as targeted marketing lists, for distribution into your sales funnel
- › Provides routing rules that automate lead assignment to suitable agents
- › Provides alerts allowing managers to intervene and reassign leads when agents are behind or unavailable
- › Book of Business enables travel agents to better maintain and nurture customer relationships
- › Ensures seamless flow of travel client information as leads are converted and followed through to completion in AXIS Travel
- › Allows you to capitalize on the advantages of full integration; namely a single, real-time source of client-centric data, and simplified administration and deployment

# LEADS MANAGEMENT

AXIS Leads Management allows your club to automate and streamline how sales leads are captured, disseminated and managed. Leads Management activates your customer-facing staff, effectively transforming them from reactive service personnel to proactive sales agents.

The system lets you more effectively manage business inquiries, how marketing lists for targeted member offers are distributed for follow-up and the relationships your agents have with designated customers. Leads management allows your club to increase sales revenue and share of wallet, as well as increase member satisfaction and member loyalty.

Travel, membership, auto travel, insurance, car care center, as well as other business lines, can use Leads Management to ensure timely follow-up on business inquiries. Integration with AXIS Travel allows your agents to use both systems as one.



## Input

Support is provided for the creation of leads through customer-initiated requests, customer activities with cross-sell opportunities, bulk/batch imports based on targeted marketing lists, as well as from agents staying in touch with current/past customers (Book of Business).

## Logic and Distribution Engine

Once leads are captured, the logic and distribution engine will direct the lead to the correct resource and facilitate the advancement through its lifecycle in a timely manner. To support lead assignment, clubs will be provided with the ability to configure a number of specific settings, such as Book of Business maintenance, agent profiles/availability, routing rules, alert and escalation rules, etc. These elements will provide support for a host of features, including priority scoring, defined sales quotas, alerts and escalations, and more.

## Presentation and Disposition

The Agent User Workspace encompasses an agent's primary job functions and includes leads-specific information, current and pending activities, and provides access to top clients listing. Using this powerful tool, agents can easily and efficiently manage their current and future activities in a manner consistent with overall corporate objectives. In addition to the Agent User Workspace, agents can enter new leads and update the status and activities of leads they are working.

A Branch Workspace provides managers with the oversight needed to ensure proper follow-up of leads within their office. Managers monitor results and reallocate leads that need more immediate attention.

## Decision Support Systems

Insightful reporting is included as a component of the Leads Management system and provides real-time performance monitoring and rearview-mirror reporting. It provides visibility and insight into the entire leads management process. As a result, club management can better monitor the sales cycles, pipeline volume, conversion rates, agent productivity and effectiveness, and more.



AXIS INSURANCE BUNDLE

Integrated Solutions. Integrated Minds.