Leads

WERDIA
INSURANCE
APPLICATIONS

COMPILES THE CORRECT CONTACTS IN A SINGLE LOCATION
- RAISES SALES TO A WHOLE NEW LEVEL

werdia

Leads

Leads – for increasing the number and quality of sales deals, and controlling calling lists

Werdia has introduced a customer relationship management system designed for the needs of Finnish insurance companies that enters fresh sales leads. The browser-based Leads system is easy to use and produces significant competitive benefits for insurance companies.

Stagnating sales

Insurance companies are increasingly using agents and outbound call centres in sales. Commission agents who are actively making calls to customers require high-quality selling leads in order to enjoy their work and maintain a high level of income. Sellers become frustrated if their registers are not updated and calling lists do not offer help in sales work. Leads received on small paper notes are easily lost.

Leads produces inventiveness in sales

Leads is a customer relationship management system developed for the needs of insurance companies. Sales leads from all possible electronic registers can be uploaded to the Leads system and sent to sellers as desired. Through the system, sellers can obtain recent information about customers who, for one reason or another, could be more interested in taking out insurance. For example, a customer may have requested additional information or could obtain additional benefits by taking out new insurance. With the Leads system, different registers can be used in sales in a more inventive manner.

In the Leads system, sales leads can be distributed and searched for using different criteria, such as insurance type, product group or region on the basis of an area code. A prioritisation order can also be created for the leads. The system adds urgent leads to the top of the calling list. For example, insurance companies can tempt customers to order urgent contacts through SMS messages. In this case, the system will search for the caller's personal information, and the seller will call the customer within 30 minutes. The goal is to improve results in sales and marketing. Leads and prospects constitute the most important capital for sales organisations!

A favourable buyer increases the seller's motivation

Quick reactions mean better services

The Leads system is light and easy to use. Any text files can be uploaded to the system if the information matches the interface description. Information can be compiled from the contact form on the website. Leads can also be entered manually.

The system contains an alarm system, i.e. information about a potential customer is moved to the top of the calling list at the time of contact requested by the customer. Sales work can also be organised so that good sellers of specific insurance types receive related leads. It is also possible to send leads between partners that use the Leads system.

Leads is a sales tool

The Leads system is a versatile tool for sellers. Notes can be entered in the system for potential customers, improving the level of quality and system in customer services. All data entered in the system will be stored. As a result, a person to whom a seller has called on the basis of a previous lead will not be entered in your calling list.

The Leads system increases efficiency, comfort and diversity in sales work. Successful sales improve the level of motivation and income. With the system, sales management can easily monitor the functionality of sales leads and the ability of single sellers or groups to utilise leads. If a sale cannot be completed, information on the reason for the unsuccessful transaction can be added to the sales lead. As a result, sales management obtains valuable information in support of product development and pricing.

Information about a potential customer moves to the top of the calling list at the time of contact requested by the customer
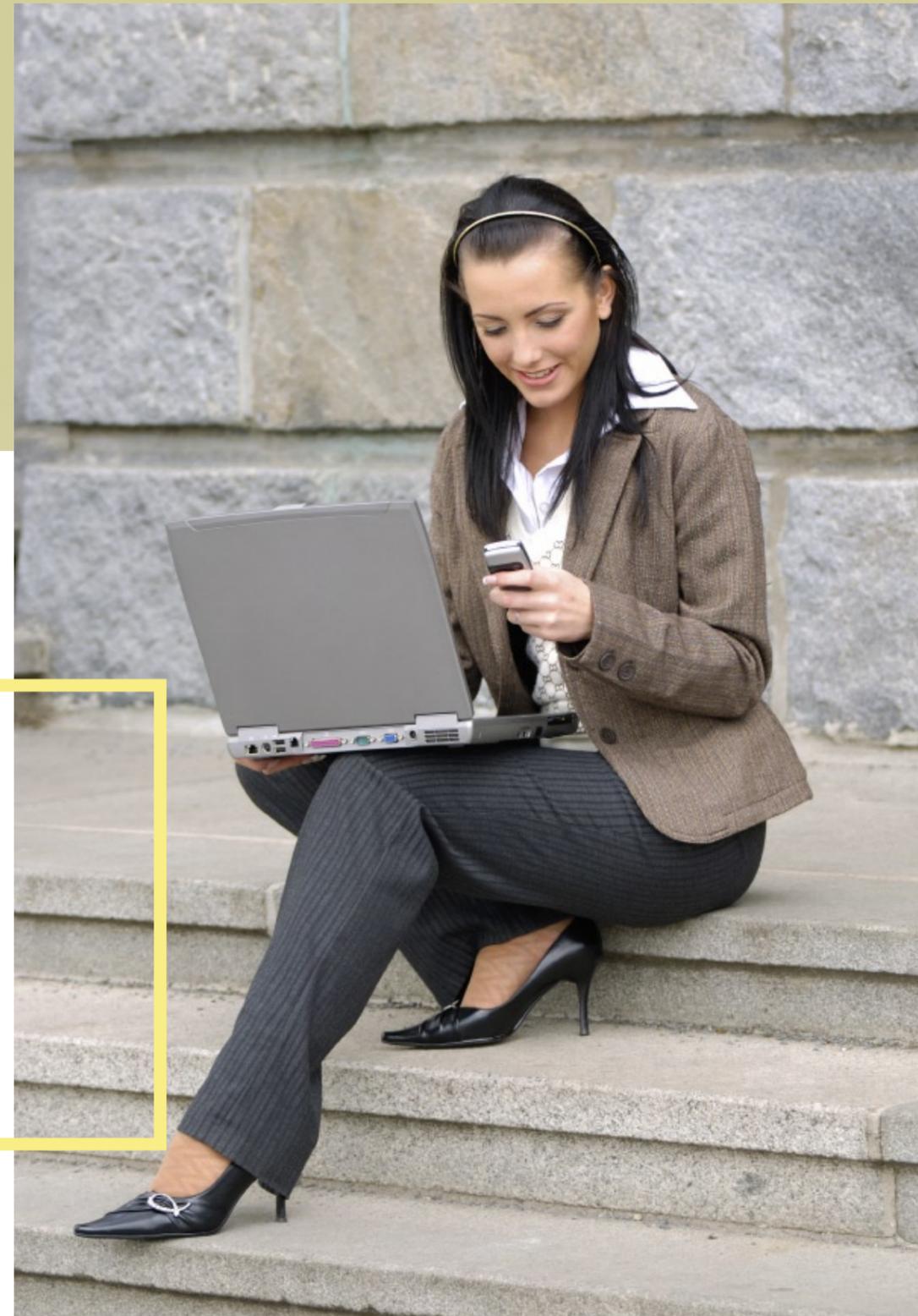
Technical system specifications

- The user-friendly user interface enables quick adoption of the software logic. Werdia organises user training for system administrators.

- Because the system is browser-based, the software is also available to remote employees 24/7. Login is carried out using an individual user ID and password.

- Administrators can quickly create or deactivate user IDs in the event of new recruitments and discharges.

- Different levels of user rights can be created for different user roles.

- The open documented interface enables data transfer from different information and insurance systems.

- Werdia organises the required hosting, maintenance and support services. Software version updates are automatically available to customers without any separate installation.

- If required, Werdia can edit the system according to customer needs and develop new functions.

- The Commissions and Leads systems are easy to integrate. They can also be installed separately.

- The system has been implemented using Microsoft.NET technology, and uses the Microsoft SQL Server database.

Sales management obtains valuable information in support of product development and pricing

Werdia Oy is a profitable Espoo-based growth-seeking company that produces innovative software solutions for its customers. The company has committed personnel with thorough competence in the insurance, infrastructure and traffic industries, in particular.

Werdia Oy produces demanding software products and services that significantly facilitate the business operations of its customers. We have vast experience in the development of innovative software products in close cooperation with our customers. Werdia has thorough and extensive expertise in the insurance and banking fields, in particular. We have designed several products for the insurance field that, for the first time, solve typical problems faced by sales organisations and improve the efficiency of their operations. Furthermore, Werdia has long-term expertise in the infrastructure and traffic fields.

Werdia is a stable and reliable software company established in 2000. Our modern and comfortable office is located in HTC Keilaniemi, in Espoo. We have long-term customer relationships and highly professional and committed personnel. We work efficiently, but with a human approach. Werdia is a financially profitable and stable company with a credit rating of AAA (Dun & Bradstreet). The company is wholly owned by its management and board members. Werdia will strongly increase its operations in the near future. Our competitiveness and competence are built on a firm foundation. We can implement demanding software solutions with highly competitive cost-efficiency. We can invest in growth, recruit new and top-class professionals and develop new innovative products for the market.

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