

Customer Acquisition Suite



Attract New Customers
Speed Time to Market
Improve Productivity

The **Fidelis Customer Acquisition Suite** is our flagship product and a true end-to-end solution that addresses the critical business need to attract new customers while streamlining the underwriting process and represents the desire for our customers to realize the most visible return--increased revenue. By providing rules based point-of-sales underwriting combined with Rating and Customer Relationship Management you have the capability to speed time to market and track proposals throughout the underwriting process while preserving critical current business processes. This robust technology platform was specifically designed for health plans over 10 years and brings highly targeted functionality that won't break your budget and increases your ROI.

- **Point of Sale Portal:** Bring underwriting to the point-of-sale for Individuals, Groups, Brokers and Agents and Account Executives
- **CRM:** Manage your Broker and Group relationships and proposal process
- **Underwriting:** Enable rules based underwriting with a robust rating engine and automate and track proposals.

Features:

- Bring underwriting processes to the point-of-sale
- Enable internal and field sales to *produce* and *manage* proposals "on-the-fly"
- Manage proposal processes in real time between sales and underwriting
- Track and follow sales cycle from sales and underwriting workflow
- Secure access to RFPs and proposals and case management

Benefits:

- Speed cycle times and reduce costly manual processes
- Quicken response times to clients and shorten sales cycles
- Streamline communications and proposal processes between departments and speed time to market.
- Increases your close ratio and shorten the sales cycle
- Provides confidence of full audit trail