



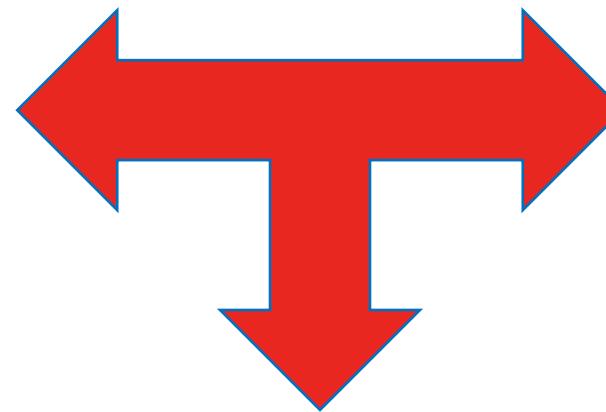
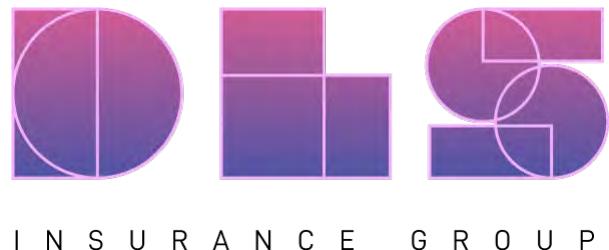
Enroll with Ease:

A Direct Enrollment Platform with  
all the bells & whistles



**SaaS**  
INNOVATION

# Confluence



**SaaS**  
INNOVATION

# The Journey to SaaS Innovation

Five years ago, a discussion occurred between insurance, finance, and technology. The focus was the fragmentation in the Insurance industry and the “pain points” of agents and agencies.

This began the benchmarking of multiple products and technologies listed here. Each one helped build the platform that placed us ahead of the pack.



# Vendor Comparison

## Features



Customer Relationship Management



Direct Enrollment/EDE



Omni-Channel Marketing



Commissions Management



Telephony Integration



White Label



DATA Ownership



Complimentary Leads



# Customer Relationship Management (CRM)

The screenshot shows a CRM application with a sidebar on the left and a main content area on the right. The sidebar contains icons and labels for Tickets, Customers, Users, Channels, Campaigns, Tools, Settings, Knowledge ..., and Analytics. The main content area has a header with a search bar, a ticket count (18), and tabs for NEW, OPEN (selected), and ESCALATED. A red box highlights a modal window titled 'Pending Tickets' in the top right corner. The modal contains a search bar, a list of pending tickets, and a section for 'Who is going to respond?' with names RUBEN PRIETO and Juan Manuel Pinera, along with interaction buttons for 'Open' and 'New Interaction'.

**Pending Tickets**

Search UI

Who is going to respond ?

RUBEN PRIETO  
Juan Manuel Pinera

Open New Interaction

**Tickets**

18 OPEN

ESCALATED

Search

**Ticket # 4198** Open

Contacted through website wants to know about ACA for her kids.  
1234567890 - SALLY DALLAS • ASSIGNED TO JUAN MANUEL PINERA • CONTACTED THROUGH WEBSITE WANT... •  
CREATED AT 2023-09-13 04:10 PM • LAST INTERACTION VIA

**Ticket # 4197** Open

Client to buy health insurance in ACA.  
123456789 - JOE TEXAS • ASSIGNED TO JUAN MANUEL PINERA • CLIENT TO BUY HEALTH INSURANCE... • CREATED AT 2023-09-13 04:09 PM •  
LAST INTERACTION VIA

**Ticket # 4195** Open

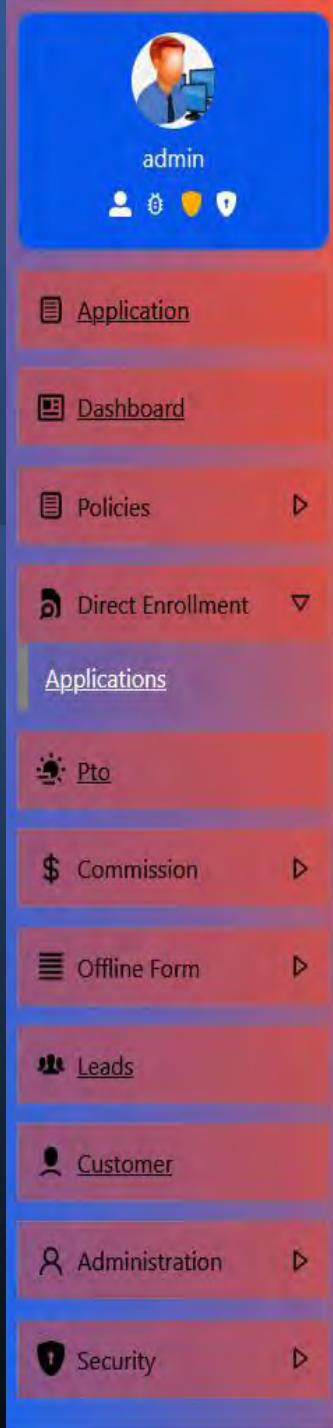
I'm interested in a health insurance.  
FL123456789 - MIKE AUSTIN • ASSIGNED TO JACKELINE VISALDEN • ADDITIONAL DATA NRO DOCUMENT... • CREATED AT 2023-09-13 03:26 PM •  
LAST INTERACTION VIA

**Ticket # 4194** Open

I would like to get a quote on Health Insurance.  
N/A - RUBEN PRIETO • ASSIGNED TO JUAN MANUEL PINERA • NEW CLIENT SERVICES • CREATED AT 2023-09-13 11:16 AM •  
LAST INTERACTION VIA

# Direct Enrollment

The CMS Trust Relationship



Portal - De - Applications - 4388612422 - Plans

Plans

See Plans Marketplace Marketing Logout

Details

KP GA Catastrophic 9100/0

CATASTROPHIC

Kaiser Permanente

Premium \$258.76/mo

Deductible \$9100/yr

Issuer	Kaiser Permanente
Your estimated all-in	N/A
Out-of-pocket max	\$9100
Doctor visits	
Generic drugs	
Quality Rating	Rating 5 / 5
Network	SBCs

Details

Cigna Connect 9100

BRONZE

Cigna HealthCare of Georgia, Inc

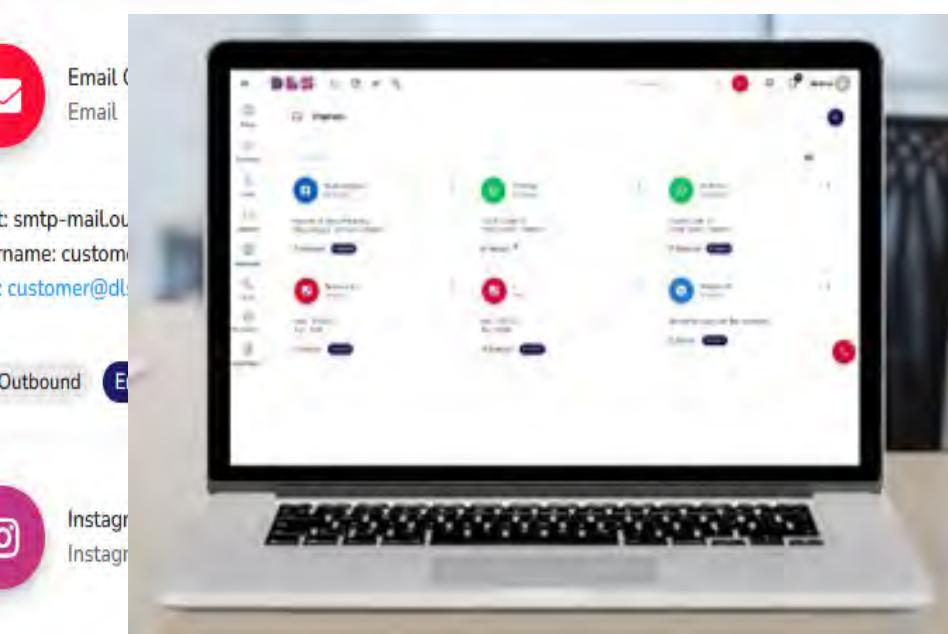
# Omnichannel Marketing (email, sms, telephony & social media)

Reaching clients through  
multiple sources in an  
organic method

Channels

Search

Channel	Status	Host	Port
Face-to-Face On Site	Enabled	127.0.0.1	5038
Incoming Telephony	Enabled	127.0.0.1	5038
Outgoing Telephony	Enabled	127.0.0.1	5038
Email	Enabled	outlook.office365.com	
Email OUT	Enabled	smtp-mailout	
Facebook OUT	Enabled		
Instagram	Enabled		



# Commissions Management

Another piece of the  
puzzle to PROFITABILITY

Portal - Commissions - Statement  
Statement

See Plans Marketplace Marketing Logout

Agent: Clemmie Kobe Cormier Carrier: Policy Number: Insured Name:

From: mm / dd / yyyy To: mm / dd / yyyy Clear Filters

Agent Name	Carrier Name	Policy Number	Insured Name	Month	Year	Amount
Clemmie Kobe Cormier	Oscar Health Insurance	THV3582002	Grant Williamson	8	2023	\$59.00
Clemmie Kobe Cormier	Liberty	MNN0104297	Marsha Gerlach	4	2022	\$106.00
Clemmie Kobe Cormier	Healthkeepers	CCY2483607	Sonia Bartoletti	6	2022	\$705.00
Clemmie Kobe Cormier	Ambetter	RWU4176271	Leo Emmerich	9	2022	\$714.00
Clemmie Kobe Cormier	Bluecross Blueshield	FVV7768166	Clara Kertzmann	12	2022	\$920.00
Clemmie Kobe Cormier	Amerihealth Caritas Next	YWI8388706	Reginald Emmerich	10	2023	\$47.00
Clemmie Kobe Cormier	Community First	FMN1825878	William Fadel	9	2023	\$278.00
Clemmie Kobe Cormier	New Era	OMT8890967	Kristopher Shanahan	7	2023	\$161.00
Clemmie Kobe Cormier	Bright Healthcare	LSQ3009459	Marc Wintheiser	9	2023	\$259.00
Clemmie Kobe Cormier	Wellmark Health	NBJ8827563	Shelly Collins	1	2023	\$994.00

Records: 52, Members: 134, Total: View

Per Page: 10 Page: 1 / 6

Load

Delete

# Telephony Integration

The missing link to CRMs

The screenshot shows a software interface for telephony integration. On the left, a window titled "MicroSIP - 5315" displays a standard telephone keypad with letters assigned to digits (1-9, \*, 0, #). Below the keypad are buttons for "Call", "DND", "AA", "CONF", and "REC". At the bottom, it shows "Online" and the number "5315". On the right, the interface is titled "Channels" and lists various integration points:

- Incoming Telephony**: Host: 127.0.0.1, Port: 5038. Status: Enabled. Inbound: Enabled. Outbound: Enabled.
- Outgoing Telephony**: Host: 127.0.0.1, Port: 5038. Status: Enabled. Inbound: Enabled. Outbound: Enabled.
- Email OUT**: Host: smtp-mail.outlook.com, Username: customer@dls-ins.com, Link: [customer@dls-ins.com](mailto:customer@dls-ins.com). Status: Enabled. Inbound: Enabled. Outbound: Enabled.
- Facebook**: Page name: DLS Insurance Group, Page category: Insurance Broker, Link: [DLS Insurance Group](#). Status: Enabled. Inbound: Enabled.
- Instagram OUT**: Status: Enabled. Inbound: Enabled.
- Instagram**: Status: Enabled. Inbound: Enabled.

It's Your BRAND  
Why give it UP?

White  
Label



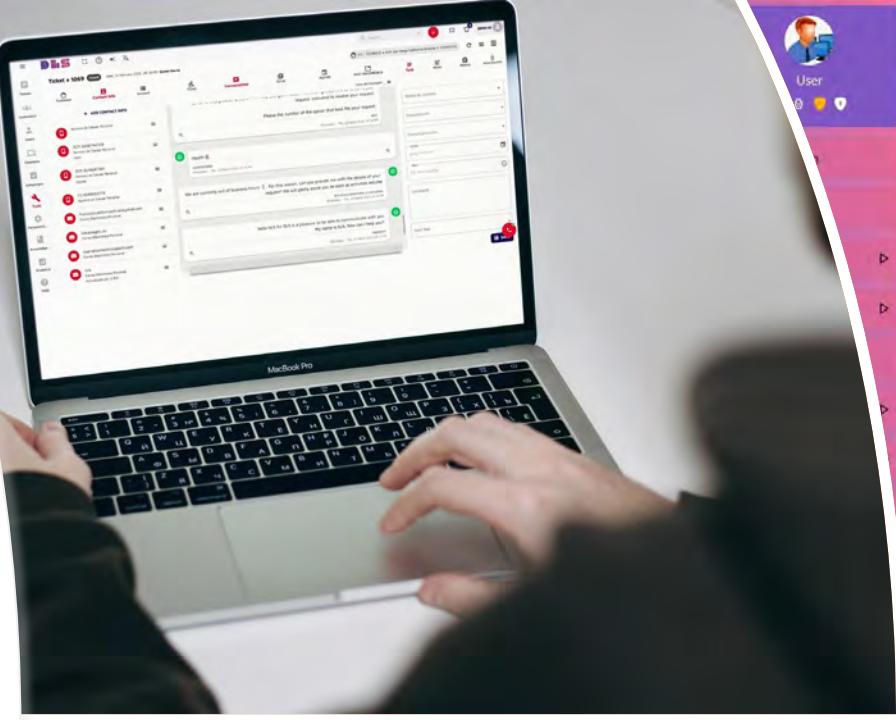
There is NO FREE LUNCH

# DATA Ownership



# Conclusion

- An ACA enrollment platform with customer relationship management, omnichannel marketing, commissions management, and telephony allows for a powerful tool for agencies, agents, and consumer satisfaction.
- Leveraging these features delivers a personalized experience. Thus, providing increased revenues, and improving overall operational efficiency.



Portal - De - Applications - 4358249661 - Plans

Plans

See Plans Marketplace Marketing

User

Sort By premium Sort Order Ascending Page 1 /22

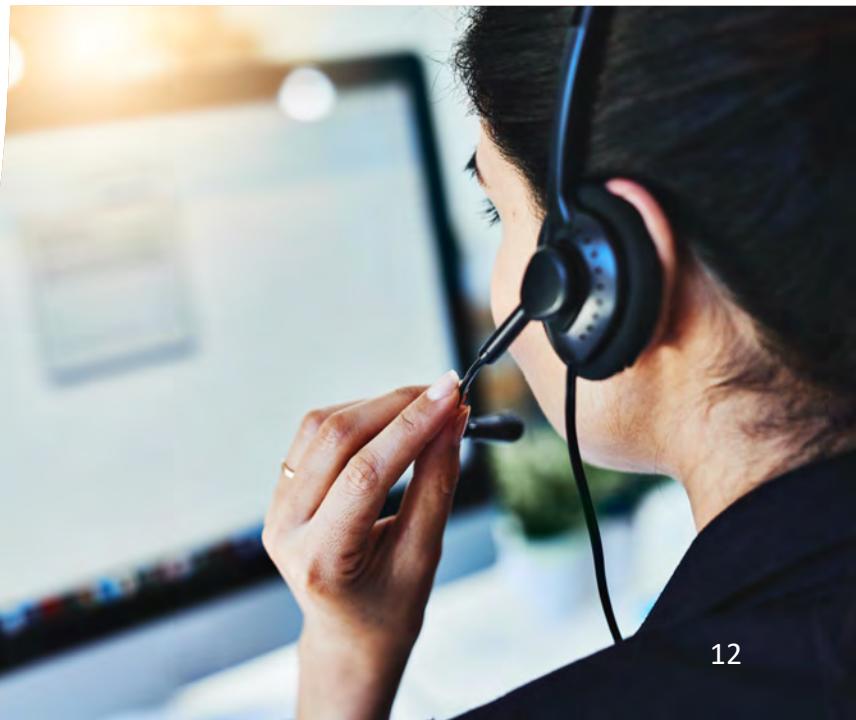
**oscar** Secure CATASTROPHIC Oscar Insurance Company of Florida

Premium \$218.35/mo Deductible \$9100/yr

Issuer Oscar Insurance Company of Florida  
Your estimated all-in N/A  
Out-of-pocket max \$9100  
Doctor visits  
Generic drugs  
Quality Rating Rating 2 / 5  
Network SBCs

Details

AmeriHealth Caritas Next Bronze + Free Telemedicine + Free Preventive Care + Healthy Rewards BRONZE AmeriHealth Caritas Next





**SaaS**  
INNOVATION



Thank you

- [demo@saas-innovation.com](mailto:demo@saas-innovation.com)