



NATIONAL
GROUP MARKETING

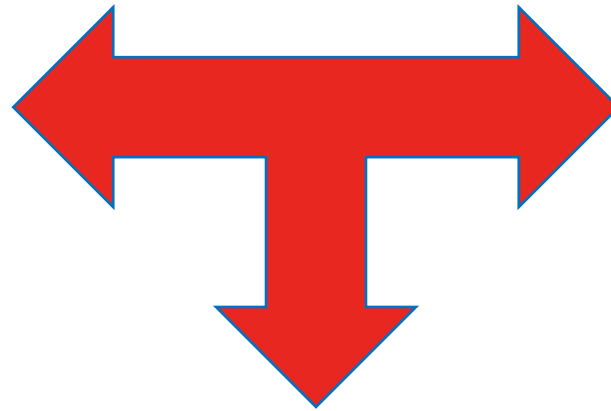


SaaS
INNOVATION

Enroll with Ease:

A Direct Enrollment Platform with
all the bells & whistles

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 displays a CRM interface with a sidebar on the left containing navigation icons for Tickets, Customers, Users, Channels, Campaigns, Tools, Settings, Knowledge, and Analytics. The main area is titled 'Tickets' and includes filters for NEW, OPEN (18), and ESCALATED. A search bar is present below the filters. A modal window titled 'Pending Tickets' is open, showing a search bar and details for a ticket. The ticket details include a WhatsApp icon, the question 'Who is going to respond?', the name 'RUBEN PRIETO', the agent 'Juan Manuel Pinera', and the date 'Sep 13 11:20 AM Ticket #4193'. Below the modal, a list of tickets is shown, each with a status (Open), description, customer information, and creation details.

Tickets

NEW OPEN 18 ESCALATED

Search

Pending Tickets

Search UI

Who is going to respond ?

RUBEN PRIETO

Juan Manuel Pinera

Open New Interaction

Sep 13 11:20 AM Ticket #4193

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

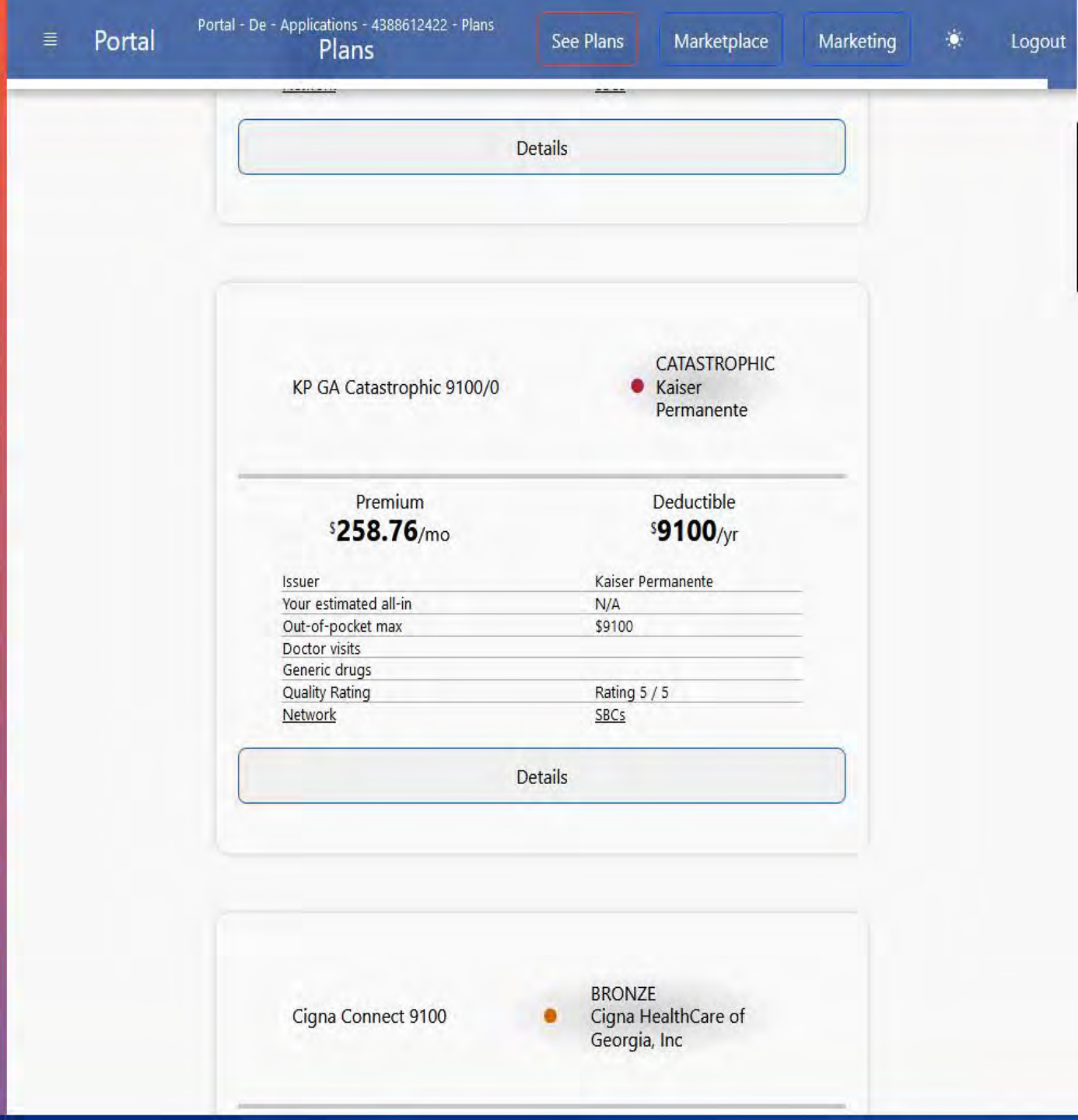
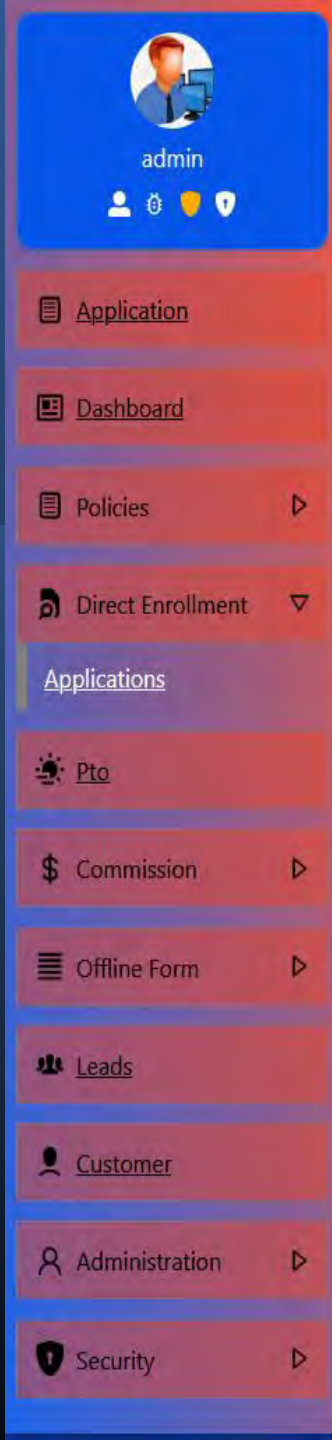
I would like to get a quote on Health Insurance.

N/A - RUBEN PRIETO • ASSIGNED TO JUAN MANUEL PINERA • NEW CLIENT SERVICES • CREATED AT 2023-09-13 11:16 AM •

LAST INTERACTION VIA

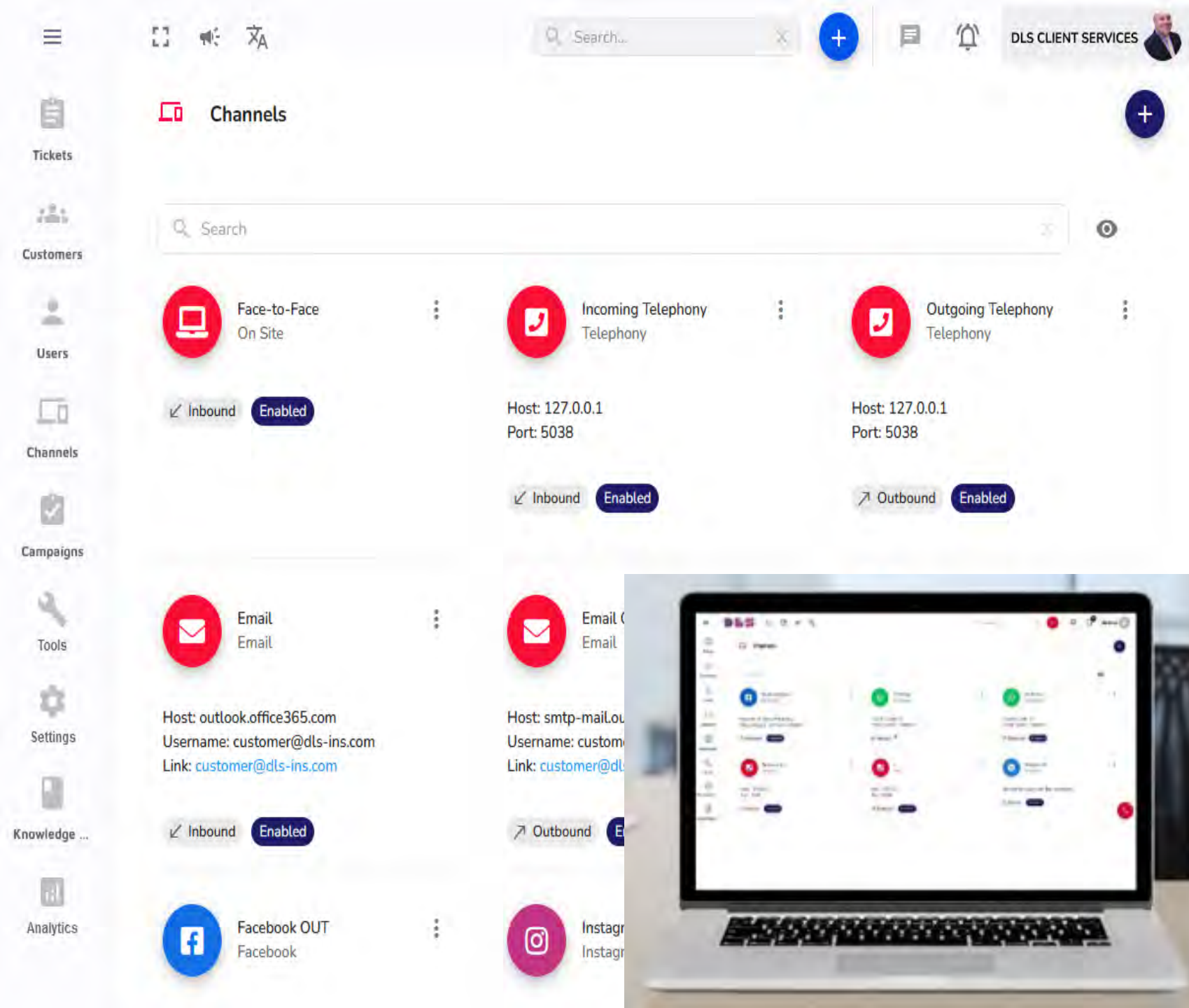
Direct Enrollment

The CMS Trust Relationship



Reaching clients through multiple sources in an organic method

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



Commissions Management

Another piece of the puzzle to PROFITABILITY

Portal

Portal - Commissions - Statement
Statement

See Plans

Marketplace

Marketing

Logout

Agent
Clemmie Kobe Cormier

Carrier
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

The missing link to CRMs

Telephony Integration

The screenshot displays a CRM application interface with a top navigation bar containing a search bar, a plus icon, and a 'DLS CLIENT S' label. Below the navigation bar is a 'Channels' section with a search bar. The main content area is divided into two columns of channel settings. The left column includes 'Incoming Telephony Telephony' (Host: 127.0.0.1, Port: 5038, Inbound Enabled), 'Email OUT Email' (Host: smtp-mail.outlook.com, Username: customer@dls-ins.com, Link: customer@dls-ins.com, Outbound Enabled with an Error icon), and 'Instagram Instagram' (Instagram icon). The right column includes 'Outgoing Telephony Telephony' (Host: 127.0.0.1, Port: 5038, Outbound Enabled), 'Facebook Facebook' (Page name: DLS Insurance Group, Page category: Insurance Broker, Link: DLS Insurance Group, Inbound Enabled), and 'Instagram OUT Instagram' (Instagram icon). A 'MicroSIP - 5315' window is overlaid on the left side, showing a numeric keypad, a 'Call' button, and status indicators for 'Online' and '5315'.

Channels

Search

MicroSIP - 5315

Phone Logs Contacts

1 2 ABC 3 DEF

4 GHI 5 JKL 6 MNO

7 PQRS 8 TUV 9 WXYZ

* 0 #

R + C

Call

Online 5315

Incoming Telephony Telephony

Host: 127.0.0.1
Port: 5038

Inbound Enabled

Outgoing Telephony Telephony

Host: 127.0.0.1
Port: 5038

Outbound Enabled

Email OUT Email

Host: smtp-mail.outlook.com
Username: customer@dls-ins.com
Link: customer@dls-ins.com

Outbound Enabled Error

Instagram Instagram

Facebook Facebook

Page name: DLS Insurance Group
Page category: Insurance Broker
Link: DLS Insurance Group

Inbound Enabled

Instagram OUT Instagram

It's Your BRAND
Why give it UP?

White
Label



NATIONAL
GROUP MARKETING



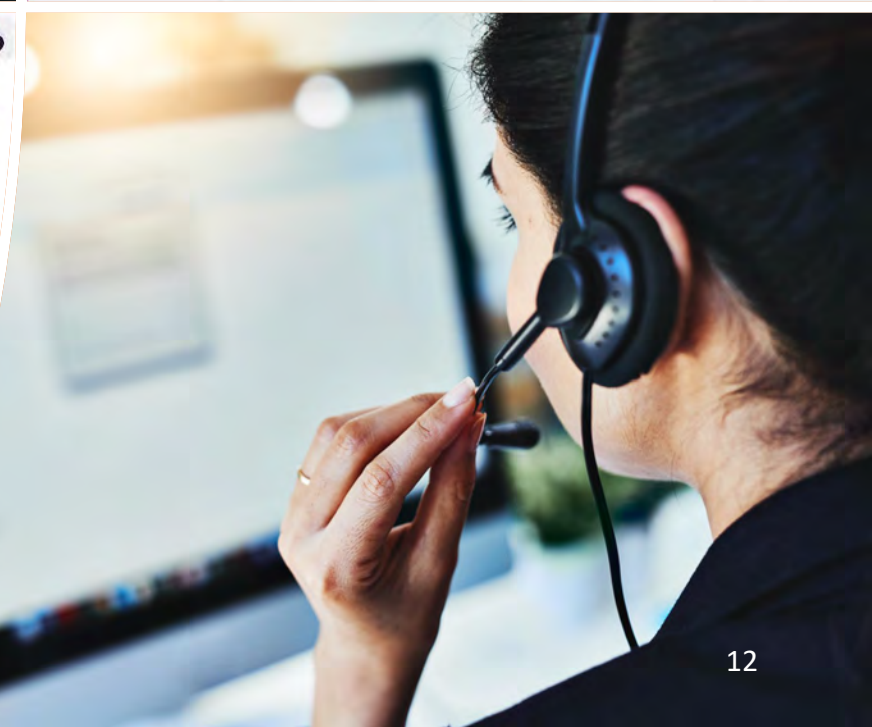
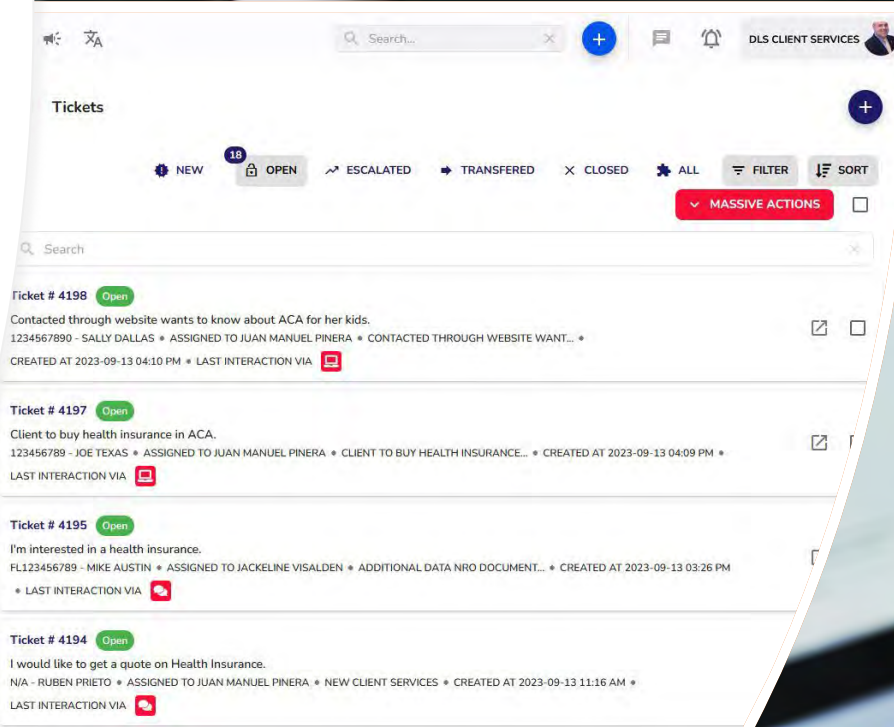
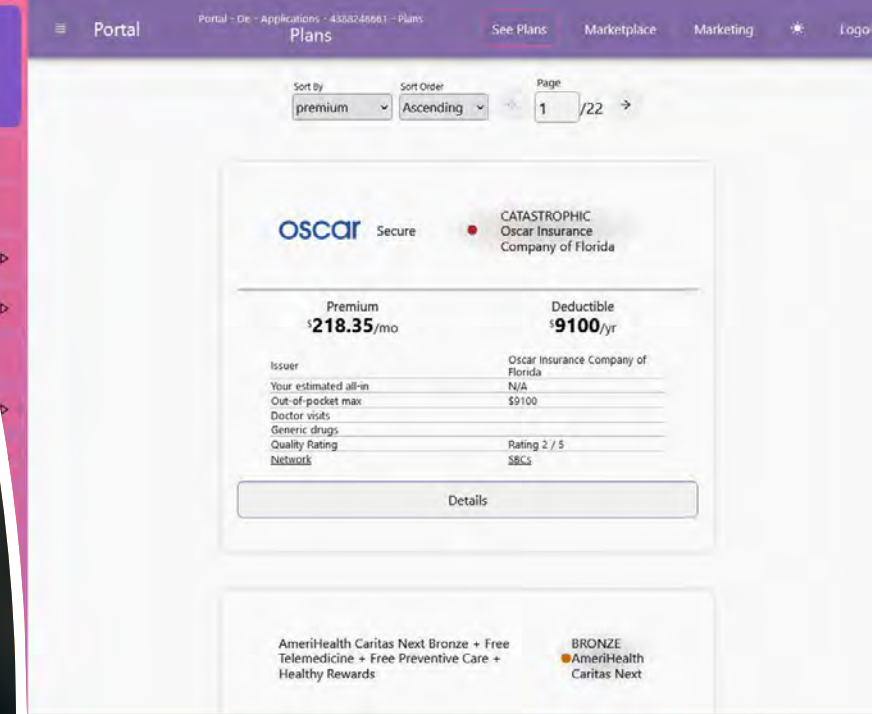
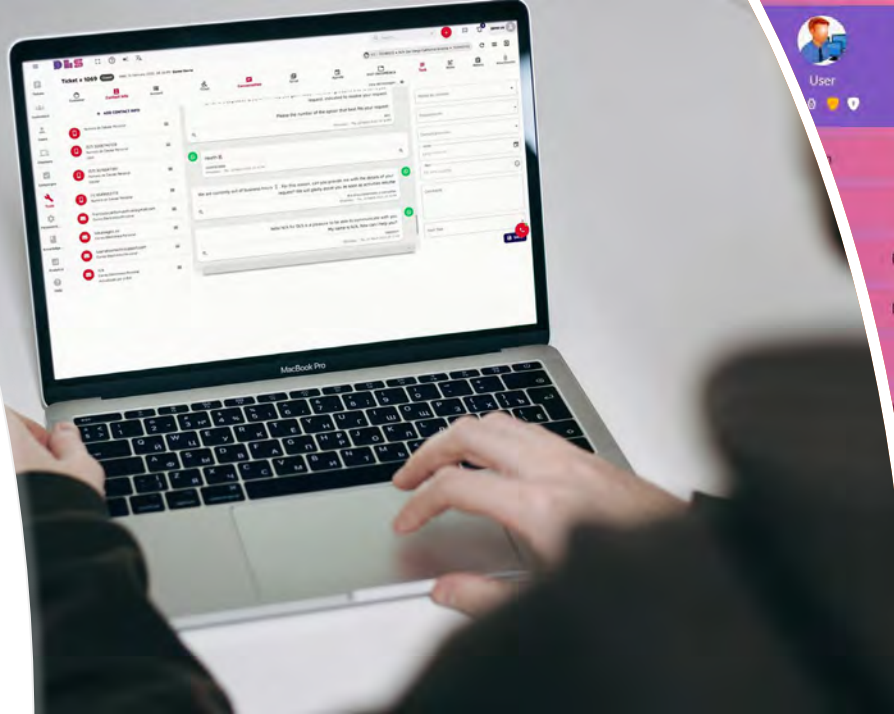
There is NO FREE LUNCH

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.





SaaS
INNOVATION



Thank you

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