

Brokertools CRM game changer is expanding into new industries

Issued by [Intermed Marketing](#)

7 Mar 2022

The Brokertools Quote, CRM and Client Portals are set for growth and Intermed Marketing is actively recruiting new talent to support its next phase of business development.



Brokertools CRM set a benchmark

Over the past 12 years Brokertools has established itself as a SaaS software provider specialising in medical scheme comparison and quote generation software integrated with a CRM system.

According to the CTO, Dinesh Copoosamy, this system is the first of its kind and applications were specifically designed for healthcare intermediaries with compliance in mind. FAIS, POPI, CMS and TCF regulatory requirements have been integrated into every step of the advice process.

The Brokertools suite of products enables insurance intermediaries, their compliance officers, corporate and individual clients to seamlessly interface via various applications such as compliance, member and employee portals.

Industry specific workflow analyses enabled the development of optimal software products to drive productivity and efficiency. Innovative products such as the Year End Revision Wizard and Web Needs Analysis were developed, both of which can be managed via member and employee portals.

The Web Needs Analysis is an interactive lead generation tool which can be used to replace physical sales. This feature can be placed on websites and social media platforms with completed needs analyses from prospective clients sent directly to intermediaries for follow up consultation. This proved to be valuable during the Covid-19 pandemic.

The Year-End Revision Wizard, which makes the annual medical scheme YER review process easy to do at the push of a button, fully FAIS compliant and more efficient than can be achieved with a personal consultation with an individual or a group of people.

For the past five years the innovative Year-End Revision Wizard integrated into the Brokertools CRM has been used by

brokerages to communicate with their members electronically, providing them with online scheme information and enabling them to find the best option and submit their option changes electronically. This has proved to be highly cost effective in areas where brokers have clients in outlying areas, reducing the cost of travel and in-person consultation.

Insurance intermediaries of the future will be redefining client touchpoints, using the web needs analysis, automated year-end-revisions, online applications and digital platforms such as member and employer portals. These technologies will free up the broker from the administrative burden, with more time to dedicate to proper specialised advice.

CRM development tailored for specialisation

These product developments are not generic CRM systems. Industry experts are involved to analyse the complex processes that the CRM needs to facilitate and customer support also reflects a deep understanding of this specialisation.

The CRM continuously evolves to meet changing needs of the client, its target markets and compliance requirements. Continuous improvement is ensured through partnering with stakeholders.

Predictive intelligence is made possible using machine learning and algorithms applicable to matching products with needs analyses in the various industries.

Venturing into new industries

Due to its track record of reliability and innovation the demand for this CRM's application to other fields in the insurance sector has increased. The natural next step in the progression of Brokertools is the application of its software in other fields of insurance: retirement funding, short term insurance, life insurance and investment planning.

In addition, there has been much interest in the CRM and the integrated suite of applications from non-financial industries.

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