



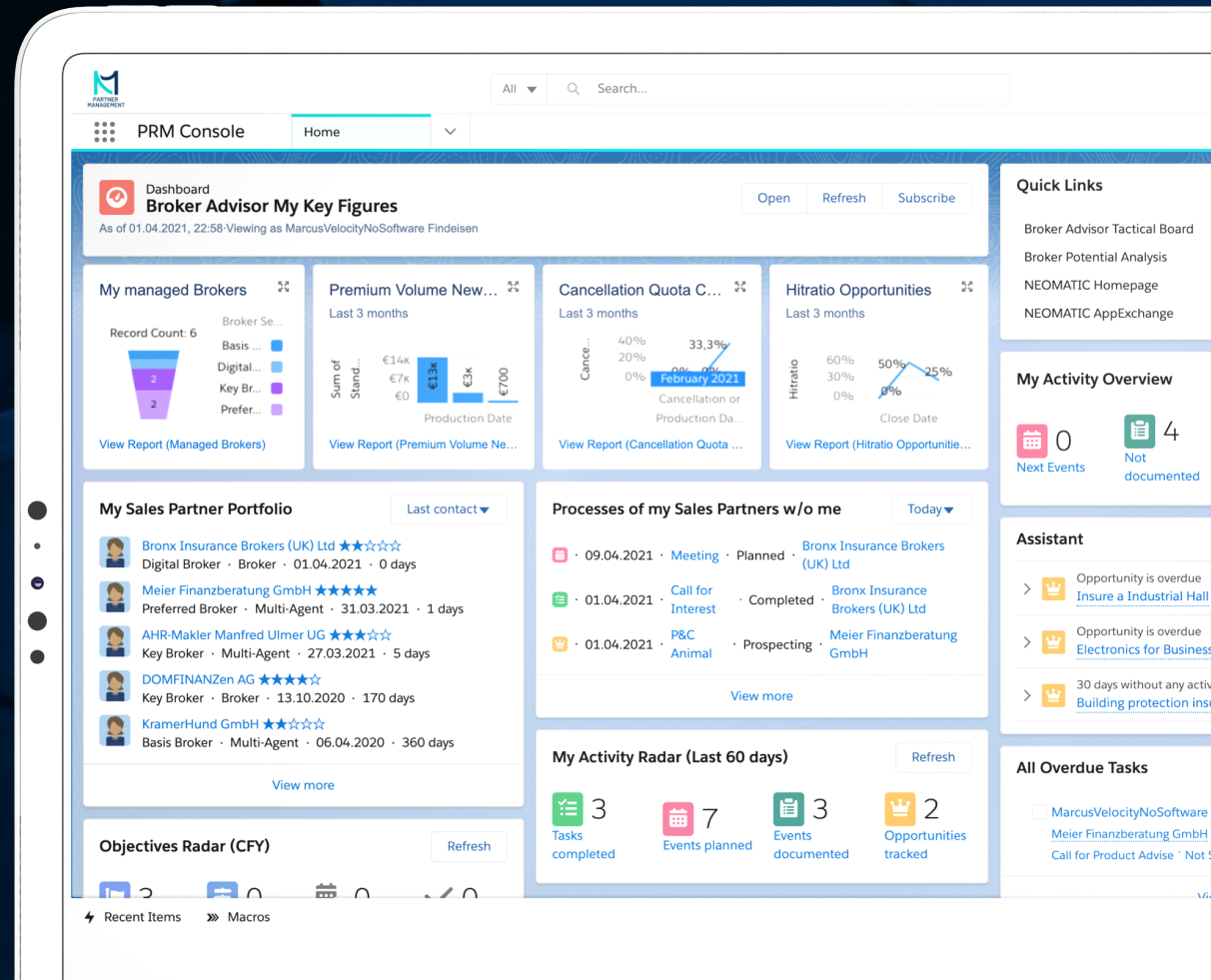
NEO.PRM

Pro-active **Partner Relationship Management** for insurance sales.



TOP FEATURES

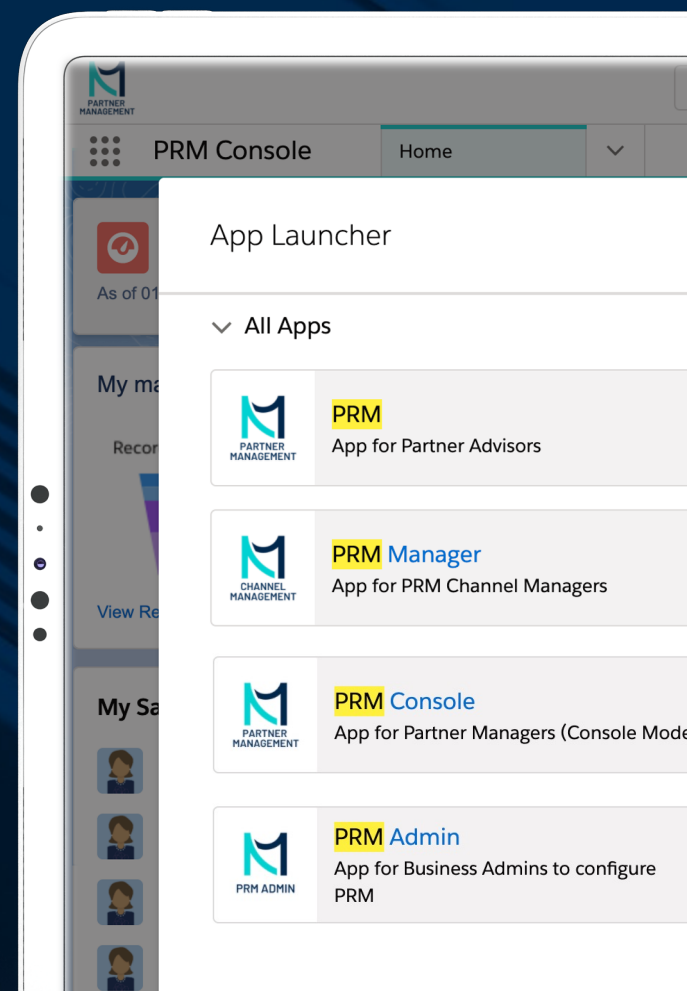
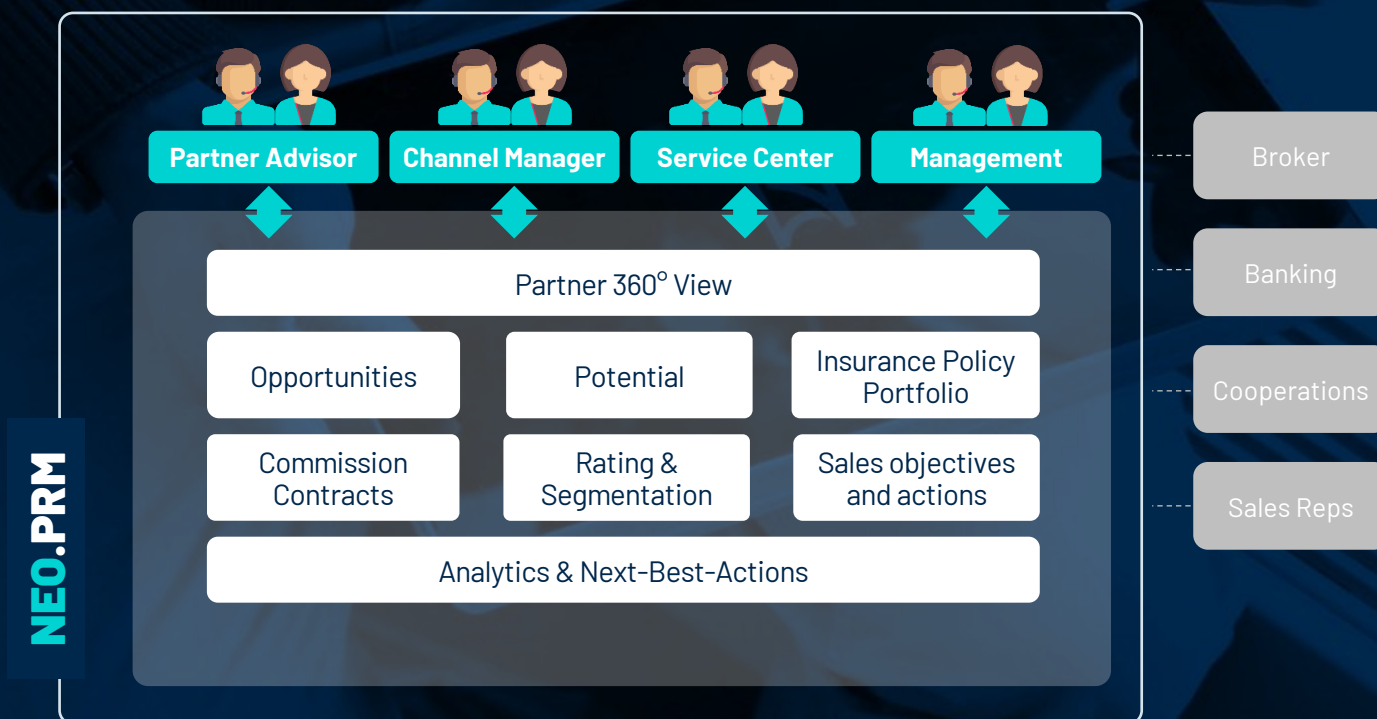
- Central Information Hub with all important sales partner information
- Digital workplace for partner managers, broker managers and sales managers
- Advanced account planning with scheduling- and task management
- Easy documentation of partner interactions (Partner Journey Management)
- Next-Best-Actions for Broker-/ Sales partner Manager
- Planning and Steering of sales actions
- Analyze partner business models and sales potential
- Integrated reporting and rating functions





NEO.PRM

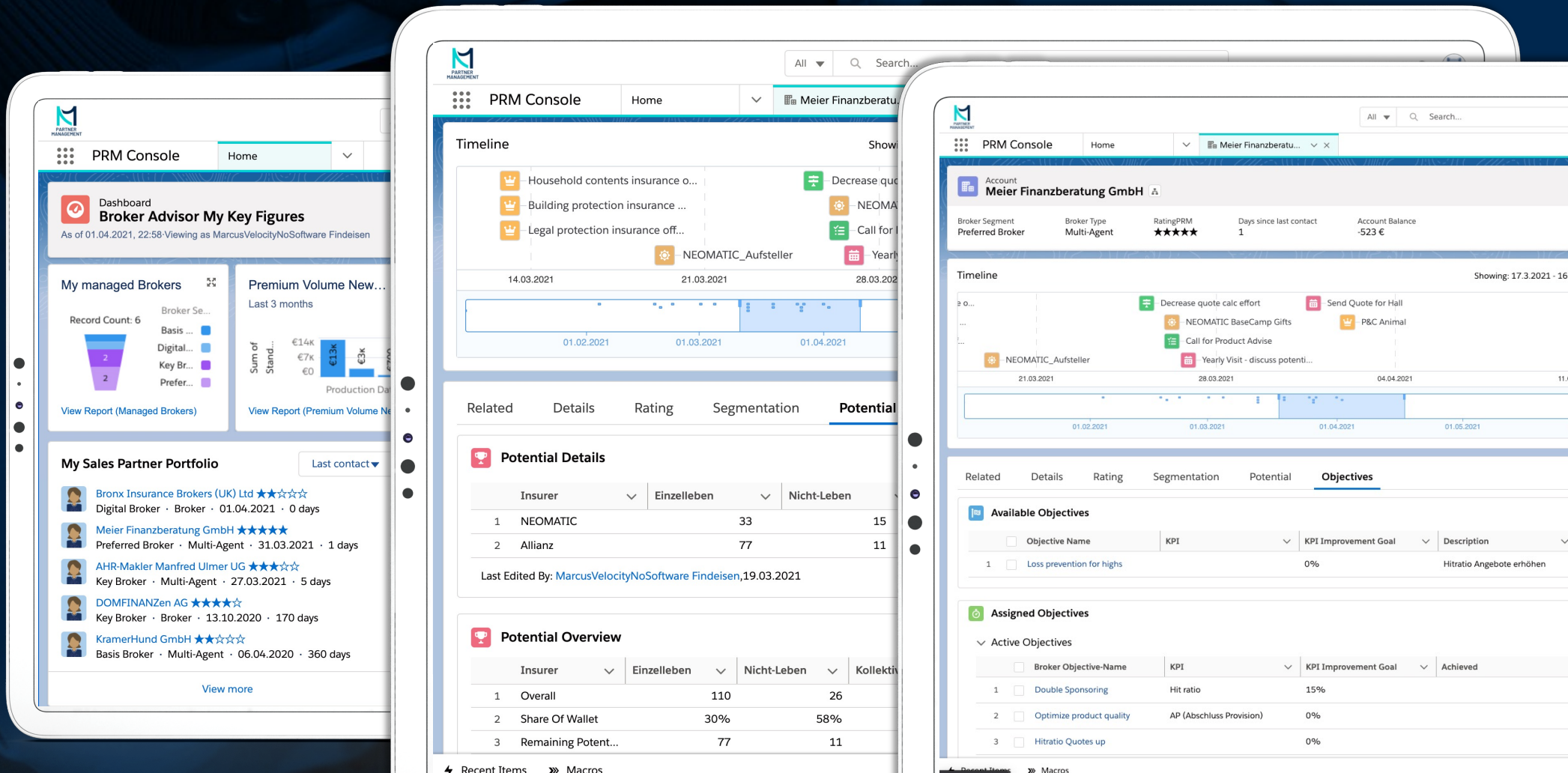
NEO.PRM is an information and service platform for **broker channel management** of insurance companies.





NEO.PR.M

Efficiently manage all sales partners, brokers and cooperative sales organizations to identify and leverage sales opportunities.





NEO.PRM

Package Content R1.0



UI

- Digital workplace for Sales partner managers
- Comprehensive KPI Radars and Dashboards
- Process and activity timelines
- 60+ different reports on insurance data

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Lightning
Comp.



Business
Logic

- Automated objective distribution
- Next best Actions on diverse triggers
- Agenda builder for account and visit planning
- Approval processes

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Flows,
Services

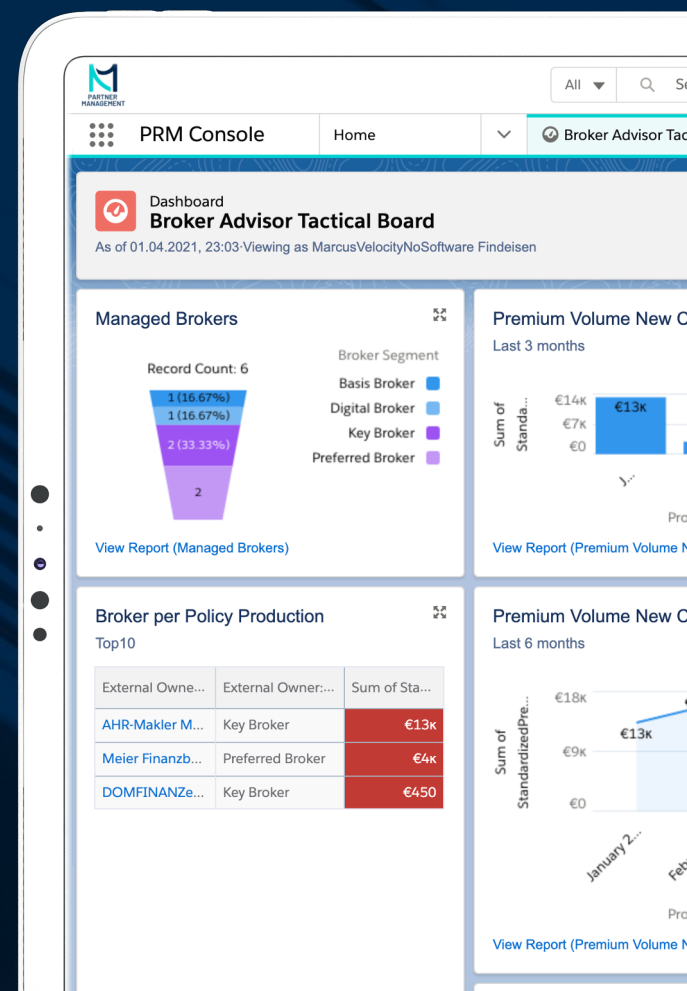


Data model

- Customer Insurance Policies
- Commission Contracts with rates
- Sales partner objectives and actions
- Potential, segmentation and rating

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Custom
Objects





NEO.PRM

Roadmap beyond R1.0

+ even more ...

Enhanced multi-level reports + dashboard

- Tactical and strategic dashboards for relevant personas
- Integration of external KPIs

Sales Partner Attention Score

- Active monitoring of partners + KPIs
- AI driven attention score model focussing on right partners

Intelligent Offer Tracking

- Concise and clear offer pipeline
 - Smart monitoring
- Guided follow-up processes



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