

SALES MODULE AND PROJECT MANAGEMENT

INTRODUCTION

Congratulations - You made a great decision. Your enrolment to the **Sales Module and Project Management** service will simplify your processes, increase your efficiency, enables you to polish your image in addition to extending your offer of service to your customers all **while reducing your costs of operations**.

*The **Sales Module and Project Management** service uses the **C-surance.ca** functionalities services specifically aiming sales management. The **Sales Module and Project Management** service ensures access to highly simplified tools that are standardized and automated to ease and optimize the activities associated with information input needed for underwriting and sales. **Sales Module and Project Management** insures electronic exchanges to all the carriers and detailed analysis of the received offers.*

Thanks to **C-surance.ca** services, **each step of** the professional group benefits insurance **management** process **is simplified** furthermore all this information can be **shared electronically** with the various participants. The **C-surance.ca** services insure access to each group benefit activities from **RFP creation to fully integrated claim adjudication**.

The **C** of **C-surance.ca** stands for **Client Centric**. All the activities are thus optimized to offer the **C-surance.ca** customer, an optimal experience which will enable him to offer its customers, partners or suppliers a controlled access to his information. The CUSTOMER is thus the **Master and the Absolute Owner** of these information and thus, control the accesses just as the authorized roles.

MDI objective is to supply you with complete and performing tools while reducing the administrative load normally required to ensure professional management of all information.

Your first impression may be anxiety when facing what seems to be a mountain of information and details to manage. This first impression will rapidly give way to a high level of ease and satisfaction. The MDI team has set up everything to keep human intervention to a minimum therefore limiting oversights and simplifying procedures.

We wrote this easy-to-follow manual to help you get a global view of the software, to better understand all the power of the **C-surance.ca** software and to fully appreciate its simplicity. Although it is a basic summary, this approach should enable you to grasp the **Sales Module and Project Management** management principles and appreciate the logical interrelations of the various information components leading to total management.

The training of the additional functionalities should be natural since it will be only one simple extension of the principles exposed in this guide. A detailed documentation is available on line.

We assume you already have a working knowledge of Windows. Since **Sales Module and Project Management** takes advantage of all Windows functions, including management to open or simultaneously process various pieces of information, this basic expertise is fundamental to appreciate our technology. To optimize and to simplify your browsing, we have integrally respected Windows universal standards.

The **Sales Module and Project Management** service provides each participant access to all the needed sales tools:

- • actuary/professional advisor;

- • Insurer

Customer can enroll into additional services that will address specific needs. An **MDI** adviser will gladly analyze your current operations to propose additional services. The **Sales Module and Project Management** service is a foundation on which rests powerful technologies and services which extends beyond sales management. By acquiring the additional **C-surance.ca** modules according to your company and your customer needs, you will be able to access any or all the administrative and/or adjudications tools. Your data can further be exploited with few additional efforts. Each option will capitalize on your current data to insure process, consultation or the generation of the reports presenting your relevant information.

C-surance.ca is a complete service which makes it possible to ensure management at all levels:

- • Carrier;
- • Advisor/advisor;
- • Sponsor;
- • Health Professional and service providers;
- • Payroll System or RH;
- • Etc

For each level, **MDI** has a range of solutions that respect the various (economic and business) needs of each stakeholder. In its most simplified form, **C-surance.ca** manages independent calculations (hypothetical or real) for each employee by optimizing employer contributions and therefore to taking advantage of all fiscal situations. In its optimum mode, **C-surance.ca** becomes the central core to manage all personnel movements, requests for projects or even self administration. See **Table #1**.

If your needs are at Enterprise, Group benefits advisor or Insurer level, **C-surance.ca** will become a significant asset for you.

To help you appreciate this guide, we structured information in sections and chapters.

Here thus the various sections as well as the types of information which you will be able to find:

Section I C-SURANCE.CA SERVICE LOGIC

Global vision of the group insurance management in the *C-surance.ca* environment

Section II DESCRIPTION OF THE WINDOWS FUNCTIONALITIES and C-SURANCE.CA SERVICE

Explains common Windows functionalities, as well as some of the most important *C-surance.ca* icons

Section III DESCRIPTION OF SALES MODULE AND PROJECT MANAGEMENT OFFERS

Chapter 1, SALES MODULE AND PROJECT MANAGEMENT ESSENTIAL: FROM CREATION TO THE ANALYSIS...

Simple and effective processes allowing for the creation of a new file, the information input and the access of anticipated results.

Chapter 2, SALES MODULE AND PROJECT MANAGEMENT: ADVANCED FUNCTIONS...

The *Sales Module and Project Management* complements which add value - Analysis of the advanced functionalities which make it possible to take advantage of the COLLABORATIVE environment and optimize the outputs. The described elements are integral part of the basic offer.

Chapter 3, SALES MODULE AND PROJECT MANAGEMENT: A SALE CONTROL PANEL

Each one of your principal activities can depend on a specialized interface aiming at optimizing consultation, management as well as follow-up of your files. In this module, all the tools needed to ensure the good management and the follow-up of the sales are controlled by the "Sales Management" module of *Sales Module and Project Management*.

Chapter 4, C-SURANCE.CA OPTIONS: ADDED VALUE...

Your exploration of the *Sales Module and Project Management* "Sales Management" module made it possible to discover less than 5% of the *C-surance.ca* potential. Discover here some additional functions which are available and which add much value for a small price.

Section IV REPORTS SAMPLES – PDF FILES

This section will provide screens and reports sample available with the basic service.

The first file will proposes request for proposal examples, whereas the second concentrates on the analysis of your carrier offers.

Section V SALES MODULE AND PROJECT MANAGEMENT SPEC

SHEETS

The basic **Sales Module and Project Management** service includes all the functions which are defined under the “Basic” columns of this table. The **Advanced, PRO** and **XPRO** services are available for the more demanding customers. Contact your **MDI** representative to find out the costs for the complementary services.

Section VI **C-SURANCE.CA** SPEC SHEETS

C-surance.ca offers each participant specific options to meet their various needs. Each function can be combined to create specific roles ensuring the required management of the activities.

This table gives a partial list of the various options available for an adviser.

Contact your **MDI** representative to obtain a more specific description of one or multiple role(s) which will suit you best.