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CHAPTER 6 – SALES MODULE AND PROJECT MANAGEMENT ADDED VALUES

We have completed the evaluation of the functions which are available under **Sales Module and Project Management**. However, **Sales Module and Project Management** represent only a fraction of the **C-surance.ca** offer.

Simply on the level of the activities associated with sale management, **C-surance.ca** makes available several highly sophisticated functions to ensure that all the needed management tools are available.

In the next lines, we will present some of the functions which you can acquire access as you gradually evolve into **XPRO** advanced versions or simply adding Virtual Calculation I modules.

ANALYSIS

Several additional options are available that can be piggy bagged on to the analysis module which we explored in the preceding chapters.

Analysis identification

Analysis # **CSR88ANA35** Check list

Creation date **2006/11/13** Rate import

Company **AAA - data demo** Rate export

Analysis name **pour demo** Hypothetical calculation

Configuration **Complete analysis** Volume calculation

Analysis options Information analysis

Analysis configuration Analysis configuration

Project	Assurer	Printing	Analysed	Sold	Estimated premium	Notes
▶ Projet de base : complet	(Basic project)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3270.67	
Copie de Projet de base : complet	Great-West	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3298.23	
Copie de Projet de base : complet	La Capitale	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3816.52	
Copie de Projet de base : complet	(Basic project)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3987.83	
OPTION 1 : Ass. salaire imposable	(Basic project)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4185.19	
OPTION 1 : complet et Imposable	(Basic project)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	
Projet de base : nouveau	(Basic project)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

RFP Analysis manager

- Link project to analysis
- Unlink project to analysis
- Move project up one box
- Move project down one box
- Open selected project
- Hypothesis calculation
- Insurance rate chart
- Information analysis
- Comparative analysis
- Monthly report
- Pay period report
- Employee summary
- Summary of tax expenses
- Claim history
- Rating history
- Monthly comparative cost
- Period comparative cost
- Comparative tax expenses

In version **ADVANCE**, **PRO** or **XPRO**, your analysis module will provide access to new options:

Sales Module and Project Management

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CHAPTER 6 – ADDED VALUE

NOTE : NO PRINTED COPY IS CONTROLLED

Analysis Options:

The “**Project Analysis**” offers a **highlight** option that will automatically identify, using the operator selected color, the benefit divergences compared to your based model. The based model will be always the first project listed in your table of analysis

In the current example: Basic project - Complete. According to your choice of report format as simple, summary or detailed; **C-surance.ca** will insure to highlight the divergences automatically.

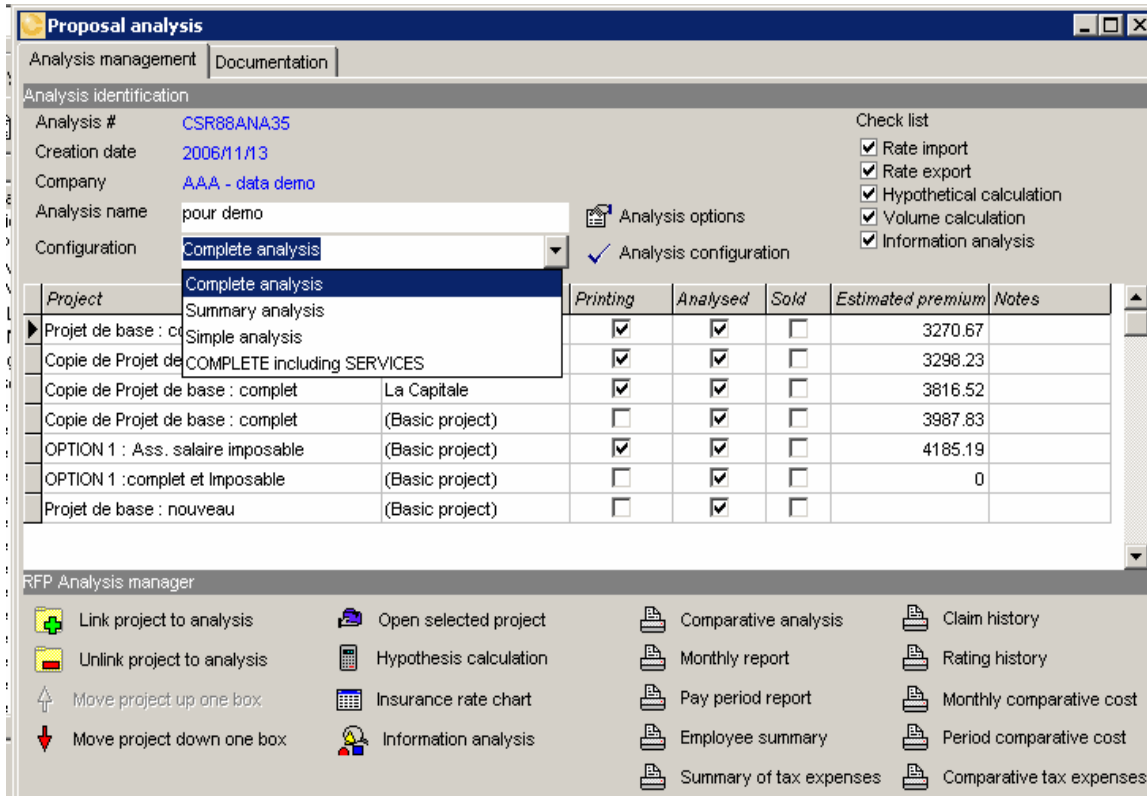
#

Group Plan coverage analysis

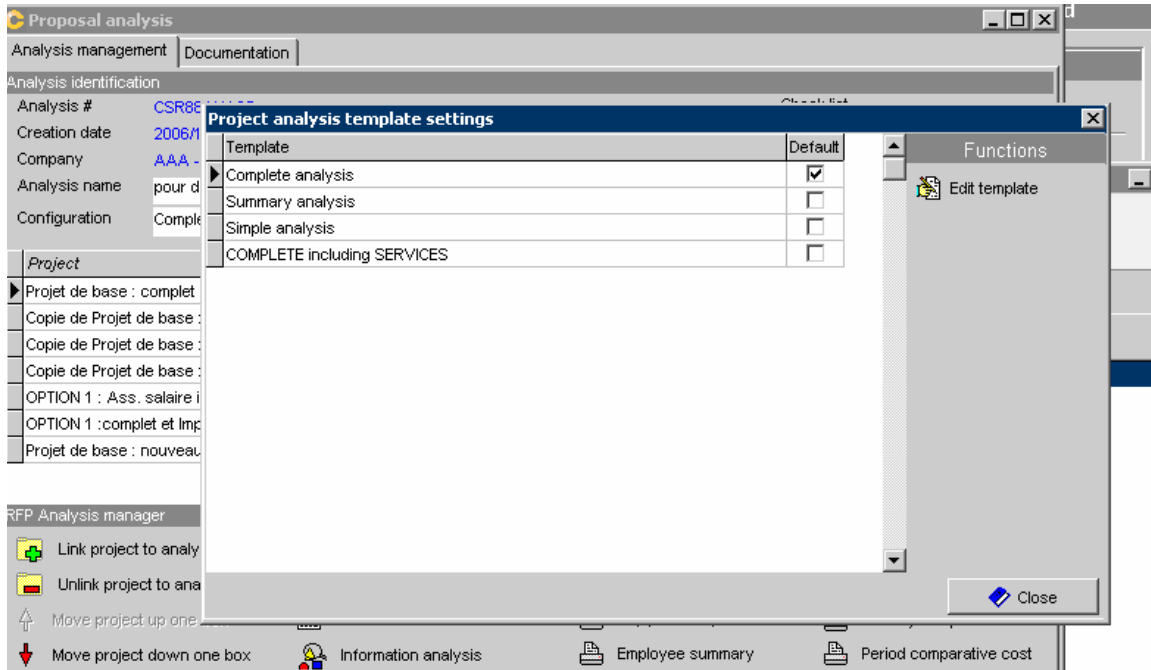
Policy holder life insurance	Basic project Projet de base , Complet (Div :)	Uxquardina Security Financiera Copa de Proje de base , Complet (Div :)	GranWest Copa de Proje de base , Complet (Div :)	Cross-Bleau Copa de Proje de base , Complet (Div :)
Coverage	10000\$	10000\$	10000\$	2 x The salary
Minimum of insurance	10000\$	10000\$	10000\$	10000\$
Maximum without evidence	10000\$	10000\$	10000\$	10000\$
Maximum with evidence	10000\$	10000\$	10000\$	500000\$
Rounded Benefits	Exact amount	Exact amount	Exact amount	To next \$1000
Enrollment - waiting period	9 Month	9 Month	9 Month	9 Month
Waiving	121 days	121 days	121 days	121 days
Reduction	From 50% at 65 years old	From 50% at 65 years old	From 50% at 65 years old	From 50% at 65 years old
Copy	At 65 years old or at retirement	At 65 years old or at retirement	At 65 years old or at retirement	At 70 years old or at retirement
Employee's accidental death and dismemberment	Basic project Projet de base , Complet (Div :)	Uxquardina Security Financiera Copa de Proje de base , Complet (Div :)	GranWest Copa de Proje de base , Complet (Div :)	Cross-Bleau Copa de Proje de base , Complet (Div :)
Coverage	2 x The salary	2 x The salary	2 x The salary	2 x The salary

Analysis Configuration

In the basic package, **C-surance.ca** offers three (3) analysis models: simple, summary or complete. For the demanding users, **C-surance.ca** offers a powerful configuration module that allows very precise customization of each element which will be displayed or printed in the analysis.



With the configuration function, the operator will be able to save his personal configurations, add them to four (4) available models or replace them.



Documentation

The “**Documentation**” section provides the operator with powerful text management tools that will simplify the integration of customized Introduction, add special note into the heart of the report as well as create a compelling Conclusion. This documentation module will be used to personalized the analysis reports packaging generated automatically by **C-surance.ca**.

The advisor will be able to use these additional sections in order to incorporate his comments, promote his service, as well as make suggestions or recommendations.

By using the “Enriched text processing” functions, it will be possible to build a professional image as well as add supporting images or documents to the analysis.

Virtual calculation I

The access to **Virtual Calculation I** option will provide simplified tools to generate for each analyzed project an individual report of the premiums or employer/employee contribution for each employee.

NO additional effort is necessary to access these reports. All the needed data for the generation of your professional analysis will be extracted from the basic information that where inputted to generate your **Sales Module and Project Management** analysis. Access to reports will be automatic and instantaneous upon demand.

Based on the level of power selected, it will be possible to have individual reports for each employee, as well as a simplified comparative summary analysis of the various invoices or employer/employee contributions. These options will simplify comparing the current plan, the various options as well as the recommended offer.

The **Virtual Calculation I** options objective is closely link to the sales processes, where we will need report that will consider the entire group of employees at the time of sale. The **Virtual Calculation II** module which is assigned to Administration service aims at managing punctual individual changes as well as global management.

Contact your **MDI** representative for more details on the options and the costs of accessing the services.