Client Management

AT A GLANCE

Improve Service with Immediate Access to Data

Support Cross-Selling Initiatives

View Client Data for Multiple Accounts and Relationships

Track Complete Client Contact History

Centralize Client Data Across Multiple Systems

Focusing on the Customer

CSC's Exceed® Client Management puts key information into your hands by accessing complete profiles on all corporate clients. As the core of Exceed, Client Management represents the logical first step in achieving a true client-oriented, integrated systems environment.

Using industry-standard XML, Exceed lets customer service representatives, agents and customers enter, edit and review all information about contact with your client in real time via an Internet browser. Customer information and interactions can be manually entered or automatically generated based upon rules. Client Management captures, stores, and displays information about any individual, household or business entity that has a relationship with your company. This includes prospects, agents, policyholders, claimants, providers, repair services and any other entities associated with your business. With a full picture of the client easily accessible throughout your enterprise, insurance professionals can manage customer service, marketing services and underwriting decisions and detect potential fraud with increased accuracy and efficiency.

Marketing Opportunities

Client Management is invaluable for identifying cross-selling opportunities by displaying a total view of a customer's relationship with your company. You no longer have to access multiple administration systems to gather information from a customer's different policies. Client Management captures an overview of every policy your customer is associated with — even business with your competitors. This information can be used for cross-selling purposes, enabling insurers to easily identify potential business through Client Management's total-view design.

Comprehensive Client View

Client Management may receive client information from several sources, including online entry, existing systems and batch processes, in addition to third-party vendors. It gives you a comprehensive view of a client, with access to complete client information including alternate names, multiple client addresses, telephone numbers, e-mail addresses, tax identification numbers, demographic information, competitor information, preferred method for contact and all client relationships. These relationships show how a client is connected to other clients, such as family members or employers, as well as relationships to policies, claims and billing accounts.

Client Management's comprehensive client view enables customer service representatives, underwriters and marketing personnel to make decisions that retain and expand a company's client base. The client system can be used to store as much or as little information as required for your business applications. Demographic information includes language, number of years as a client, and tax identification number information, including a 1099 reportable indicator. For individual clients, demographic information also includes employment information, date of birth, citizenship, education level, state/province of birth, date of death, driver's license information, gender, marital status and even credit report information returned from a third-party information ordering source. For business clients, standard industry codes, revenue range and business license information are stored. Reference numbers, including membership numbers for associations, also can be stored for clients.

Account/Household View

The client account process will allow users to group clients together and use an address, telephone number and e-mail/URL address as common information. Relationship types of account contact and account members are used to identify clients in a client account. An example of an account view could be a household view. The account is established, and all clients related to the account are associated by Client Management, including all businesses related to that household. This view provides not only a total, comprehensive view of the account or household but also provides ease of maintenance. Data that is common to the members of the group such as address, phone or e-mail address only needs to be updated once. The updated information will display when viewing each member's separate data. Client Management lets users easily create new client account relationships (between either new or existing clients), add additional members to an existing account or expire a member's relationship to an account.

Easy Access

In the past, professionals were required to enter specific policy or membership numbers into a system to locate customer information. Client Management streamlines this task by providing a variety of search capabilities. A name, part of a name, address, phone number, Social Security number, birth date, federal tax ID, specific role and postal code are all potential search qualifiers. This expanded search capability reduces time spent trying to identify the correct client and eliminates duplicate entry of client information. Customer service is further enhanced with Client Management since the client database can be quickly accessed from anywhere in the system. Rather than replicating the client application function, all components use Client Management application interfaces for processing.

Data Integrity

Data integrity is an additional benefit. Using Client Management as a central storehouse for client information, insurance professionals update client information only once. Client Management stores the new and updated information, which is immediately available to any other application. Client Management moves the system and workflow focus away from the transaction to customer-centric processing. Client Management also provides the capability to delete a client entered into the system in error or to merge duplicate clients. Client Management can interface with any third-party address-scrubbing vendor for address validation. It even provides a screen that lets users override the address returned from the third-party vendor when a validation error occurs.

Application Integration

Client Management displays high-level summary information, such as summary billing, policy and claims data from various administrative systems. Client Management also offers seamless navigation to the detailed policy, claim or billing information when a more explicit view is needed. With easy navigation between applications, users who need detailed information can use hyperlinks to navigate to the appropriate Exceed or legacy application, review the information and return to the client notebook. Name formatting is even provided for policy and claim processing so that joint or interested parties can be accommodated. Integrated with the Work Management components and other business applications, Client Management can be used to help manage relationships with your customers. Client Management lets users log in information about each contact and the need for follow-up contact — an important step in realizing the benefits of customer relationship management.

Integrated with Exceed's Work Management components as well as other non-CSC business applications, Client Management can be used to help companies manage customer relationships. In addition, the Contact History feature of Client Management allows users to either enter information about customer contacts and note any necessary follow-up or take advantage of contact history information that can be automatically generated by the system. Exceed's Contact History is an important step in helping insurers achieve true customer relationship management.

For more information about CSC's Exceed solution, call 800.345.7672 or send an e-mail to inforequests@csc.com.

About CSC

Computer Sciences Corporation, one of the world's leading consulting and IT services firms, helps clients in industry and government achieve strategic and operational results through the use of technology. The company's success is based on its culture of working collaboratively with clients to develop innovative technology strategies and solutions that address specific business challenges.

Having guided clients through every major wave of change in information technology since 1959, CSC combines the newest technologies with its capabilities in consulting, systems design and integration, IT and business process outsourcing, applications software, and Web and application hosting to meet the individual needs of global corporations and organizations.

About CSC in Financial Services

CSC distinguishes itself through its time-tested ability to plan, build and operate highly reliable, efficient and secure business and IT solutions for leading financial services firms around the world. To complement its capabilities in consulting, systems integration and outsourcing, CSC brings financial services industry knowledge and experience, a comprehensive portfolio of financial services application software and an extensive network of industry and technology partners. More than 10,000 CSC employees are dedicated to serving financial services clients, including more than 1,200 major banks, insurers and investment management and securities firms.

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