



Magic Portfolio

Your Customers Delight

Technology has changed the lifestyles of people. The consumer of today behaves very differently from the consumer of yesterday. Computers, Internet and Mobile Phones have made tremendous impact on the behaviour of consumers. There were times when our insurance customers were satisfied with little or no information about their portfolio. Then with the advent of PCs, you started giving them computer-printed presentations. And this became a standard expectation of all your customers.

Customers are now becoming more demanding day by day and the competition in insurance selling is increasing. If you have a passion to succeed in this race, you need to create your identity among lakhs of insurance professionals in the country. You need to be creative and distinguish yourself in your style of selling and servicing your customers. Something that will delight your customers and leave a lasting impression on to their mind regarding your service.

You have been using our software and giving attractive printed presentations to your customers. How about giving your customers a presentation software, which will contain important information about insurance products, pre-sales and post-sales presentations, insurance / investment portfolio details and other useful information.

Introducing Magic Portfolio - Your Customers Delight

INSURANCE

What is Magic Portfolio?

Magic Portfolio is a wizard based software application. It creates the presentation software to be provided to your customers on a CD.

What can you do with Magic Portfolio CD wizard

- ▶ The Magic Portfolio CD Wizard* enables you to create a personalized CD for your customer. In this CD you can provide him with the following:
 - His insurance and investment portfolio presentations
 - Any pre-sales presentations such as Multi-Plan, Break-even Charts, Magic Plan or any other Wonder-Plan.
 - Scanned images of all his important documents such as Policy Bonds, Premium Receipts etc.
 - Insurance products' information
 - Information about yourself and your achievements / credentials
 - Useful forms which may be handy at anytime, such as Passport Application Form, Income Tax Saral Form etc.
 - Other items of family interest such as Games, Recipe Book etc.
- ▶ Document Scanning and Archiving: This feature will enable you to convert your office into a virtually paperless office. You can scan and digitally store all documents including policy / investment related documents of your customers.
- ▶ Print stickers for Customers CD for branding yourself and personalizing the CD in the name of your customer.

How will Magic Portfolio help me?

The Customer CD will be branded with your name. The software provided on the Customer CD has a sleek user-friendly interface. Presenting this CD instead of the regular printed presentations will certainly enhance your brand image and give a professional tech savvy look to your customers.

Bundled with the pack you will get:

- 50 Pre-Printed CD Surface Stickers
- 50 CD Jackets
- A Sample of blank CD Surface Sticker

So, what are you waiting for!

Order your copy of **Magic Portfolio** today and get on to the fast track of branding yourself as the Insurance Agent of tomorrow.

MRP: Rs. 5990/- plus taxes

Please note that you need to have a CD-Writer installed on your PC to use the Magic Portfolio CD Wizard



Customer CD: Intro Page



Customer CD: Report Viewer



Customer CD: Printable Forms



Customer CD: Games



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