

InsureFlow 365

AI-Powered Insurance CRM on Microsoft Dynamics 365

Unify policy, claims, compliance, and customer operations on one intelligent Microsoft platform.

InsureFlow 365 is a purpose-built insurance CRM that helps insurance organizations modernize core operations, streamline policy and claims workflows, improve agent and broker productivity, and strengthen compliance across insurance operations.

Built on: Dynamics 365 | Dataverse | Power Platform | Azure | Copilot AI

6 Weeks

to Production Go-Live

3× Faster

Claims Resolution Cycle

+45%

Agent & Broker Productivity

Compliance-Ready

Regulatory & Audit Compliance

The Industry Challenge



Fragmented Policy & Claims Data

Disconnected systems block a single customer view across products.



Manual Compliance & Audit

Spreadsheet-driven KYC and AML processes increase regulatory risk.



Low Agent & Broker Productivity

Repetitive workflows reduce time spent with customers and prospects.



No Real-Time Operational Visibility

Leadership lacks live KPIs for portfolio, claims, and renewals.

The InsureFlow 365 Platform



Policy Management

Quote-to-issue, endorsements, renewals across LOBs.



Claims Management

FNOL to settlement with SLA tracking and automation.



Agent CRM

360° customer view, lead-to-policy, cross-sell prompts.



Broker & Commission

Hierarchy, plans, reconciliation, statements, payouts.



KYC & AML Compliance

Screening, risk scoring, e-KYC, audit trails.



Takaful Operations

Participant fund, surplus distribution, Sharia controls.



Executive Analytics

Real-time KPIs on portfolio, claim trends, loss ratio.



Microsoft Copilot AI

Generative AI for underwriting, claims triage, and service.

End-to-End Insurance Operations



Enquiry



Quote



Policy



Premium



Renewal



Claim



Settlement

Why InsureFlow 365



Insurance-Native

Purpose-built data model and workflows for life, health, P&C, and Takaful lines of business.



Microsoft-Powered

Built on Dynamics 365, Dataverse, Power Platform, Azure, and Copilot AI.



Compliance-Ready

Designed for GCC regulatory needs and full auditability across KYC, AML, and reporting.



Fast to Deploy

Accelerator-led, fixed-scope implementation designed for rapid deployment-go-live in as little as 6 weeks.

Business Value



Faster Claims Operations



Better Customer Experience



Higher Team Productivity



Stronger Compliance



Better Renewal Visibility



Real-Time Decision Support



Ready to modernize insurance operations?

See how InsureFlow 365 can unify your insurance workflows on Microsoft Dynamics 365.

www.octaware.com | connect@octaware.com

Book a Demo



SCAN TO VISIT