

+ TIME
+ SALES
+ CONSULTATIONS

Video consulting +

bridge





“Bridge is a lot of fun for our agents as well as our customers, because it is interactive and the customer, compared to other tools, can participate. Bridge is simply professional and we are very satisfied with the cooperation. We will definitely stay with Bridge !”

Norbert Porazik

Managing partner , Fonds Finanz Maklerservice GmbH

Bridge digitizes your client conversations

Our web- and cloud-based software enables an efficient and sustainable on-line consulting experience. Video consulting+ by bridge.

Video-chats and screen-sharing have become standard. For truly successful on-line sales of insurance and finance products and services those are just not efficient enough.

Bridge automatically documents every consultation, contracts are signed directly on-line, data acquisition is interactive, and customer information is available in a set cloud library at all times.



YOUR ADVANTAGES WITH BRIDGE

You save money – on-line consultations remove dependency on set locations, and save you any travel expenses. You save time – 8 hours per week thanks to automatic recording of all consultations. This time can be used on client acquisition and further in-depth consultations. Digital signatures allow for contracts to be closed efficiently and with consideration to the environment.

“We decided on Bridge because it not only depicts individual sections of the consultation, but is a holistic tool. I can implement and document any consultation process, whether online or offline, with Bridge. There are small features in Bridge are integrated, with which you differentiate yourself from the competitors on the market.”



Toralf Schröter

Sales manager,
aruna GmbH





− **100€ fuel & postage** /month



− **1,5 tonnes of CO₂** /year



+ **Appointments x2**



− **8 Work hours** /week*

*All figures presented here are based on customer surveys from January 2020.

VIDEO CONSULTING +

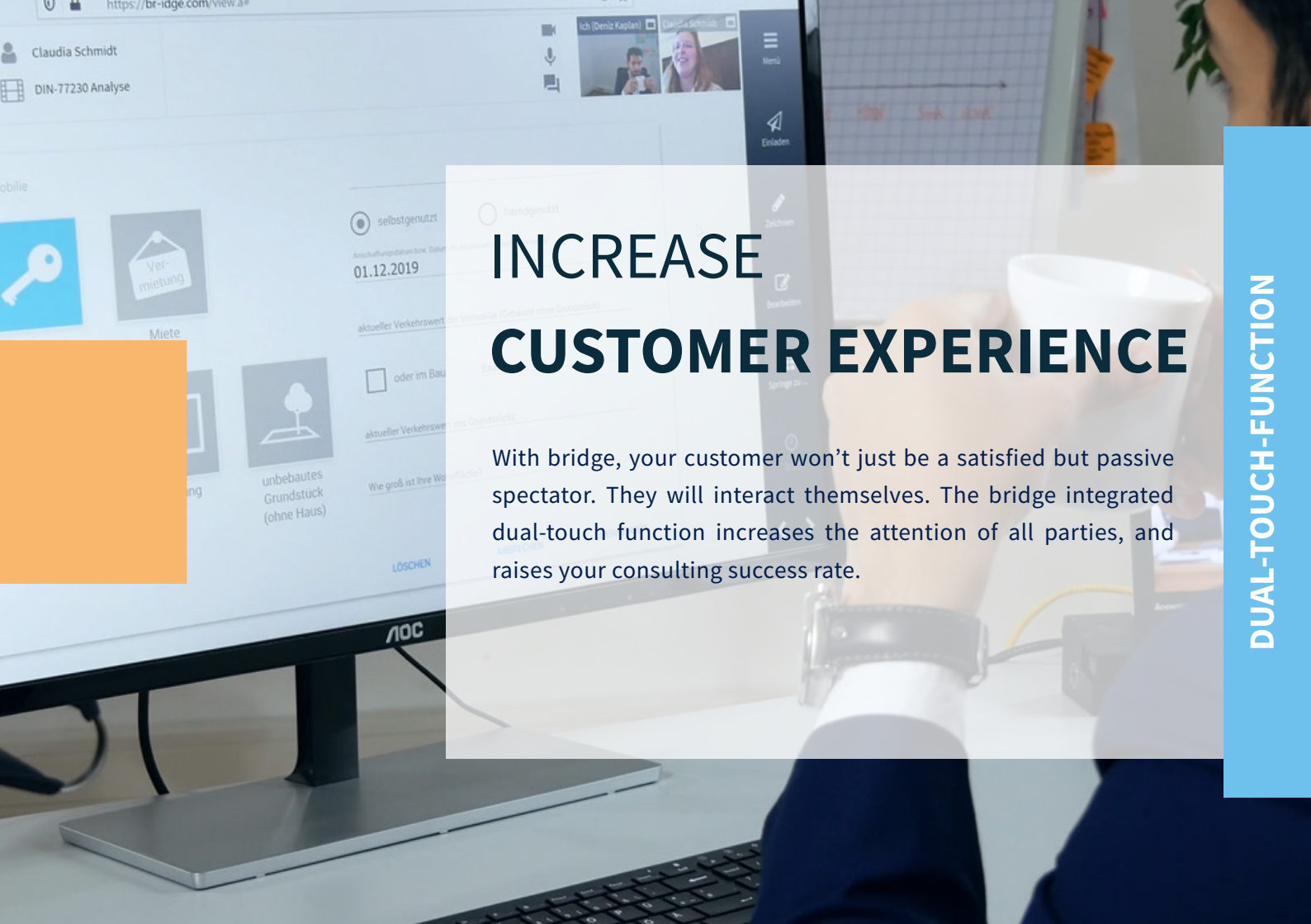
In addition to video-chat and screen-sharing

Bridge offers:

- + **Dual-touch interaction**
- + **Drawing, mark-ups and note-taking on all pages**
- + **Automatic documentation**
- + **Predefined interactive (consultation) guidelines**
- + **Digital signing of contracts**
- + **A cloud library for all documents and customer data**
- + **An interface to your CRM system**

bridge

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INCREASE CUSTOMER EXPERIENCE

With bridge, your customer won't just be a satisfied but passive spectator. They will interact themselves. The bridge integrated dual-touch function increases the attention of all parties, and raises your consulting success rate.

DUAL-TOUCH-FUNCTION

DATA ENTRIES, DRAWING & NOTES



INTERACTIVE CONSULTING

With Bridge, each presentation slide can be drawn on or edited during a consultation, including making mark-ups and personal notes. Important Information or notes can be highlighted, and relevant information marked. Take your notes directly during the consultation, and save preparation time for any follow-up. Empty whiteboard slides can be used for free drawing, or if any additional notes are made.

INCREASE SUCCESS

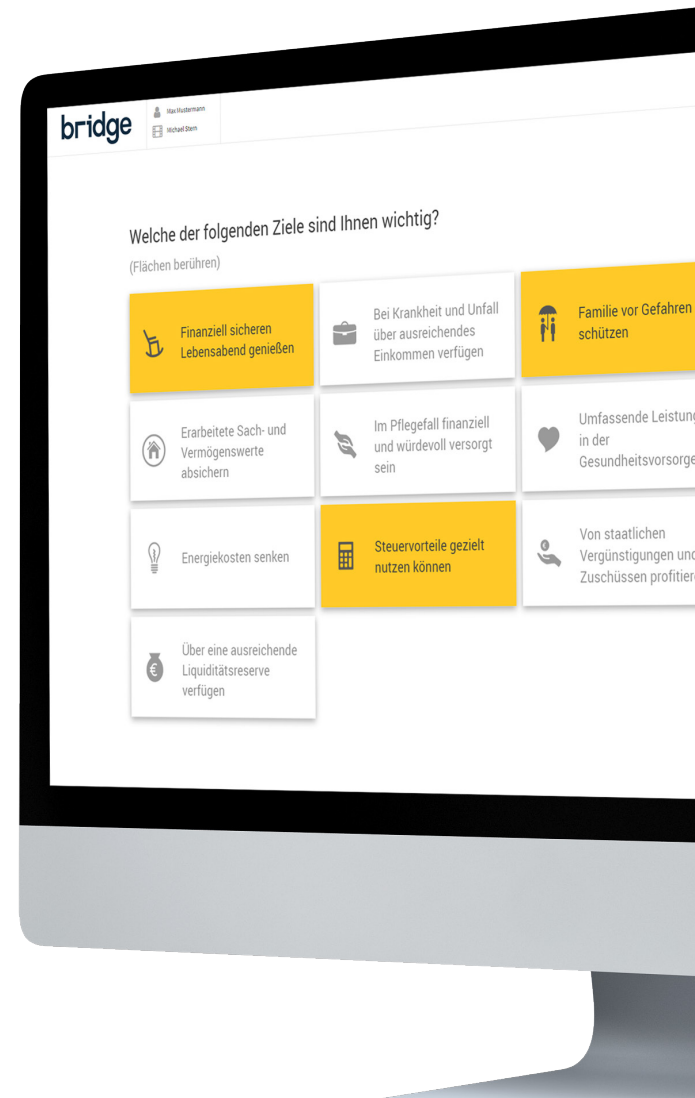
Our digital signature allows all parties to sign digitally for all applications, contracts, and documents that require a signature, with no need of printed out documents or handwritten signatures. The digital can be given during a live consultation, or completely on-line. The signatures, done with inSign, are legally compliant, DSGVO-compliant and TÜV-tested.

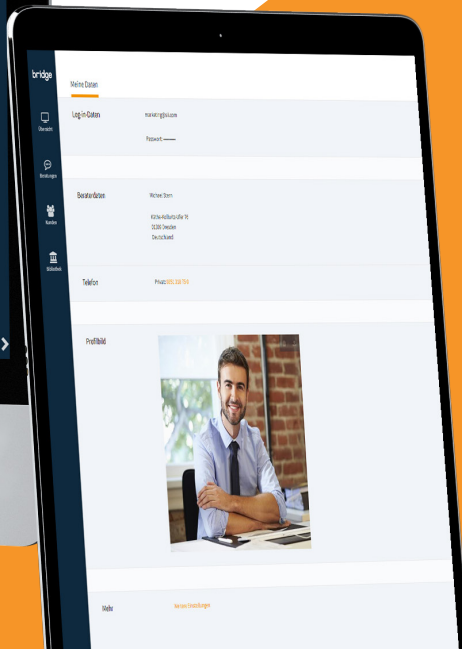
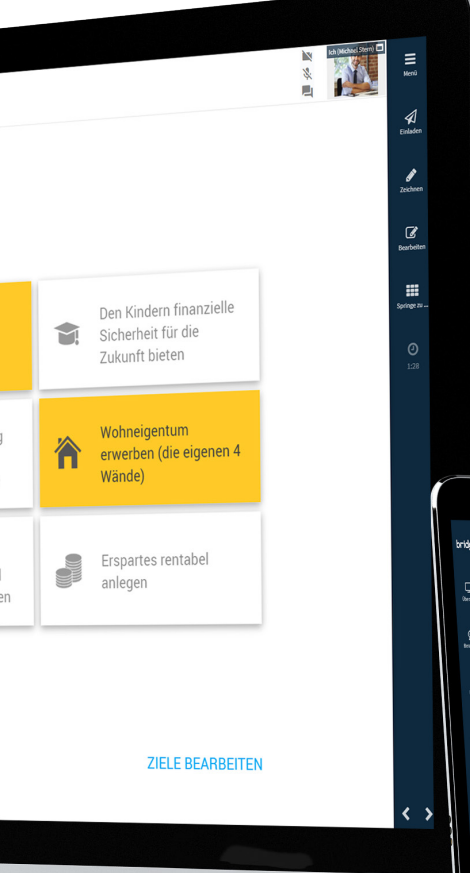


DIGITAL SIGNATURE

INTERACTIVE GUIDELINES

Bridge offers a variety of predefined and interactive consultation guides. All are available for use directly online for any consultation. Some guideline topics include occupational disability, personal and construction savings, and long-term care insurance. Consultants can use the entire guide, or chose individual slides from a guide and adjust the content. The interactive guidelines allow consultants and customers to make simultaneous entries, mark items or take notes. The basic financial analysis, according to DIN 77230, is integrated into Bridge as a guide, as well.





AVAILABLE SOON

Basic Financial Analysis according to DIN 77230

Bridge offers a complete analysis guide as an additional module. With it you can easily enhance any basic financial analysis with your client, in accordance with DIN standards. The analysis records and evaluates the financial situation of a private household, focusing on the areas of property- and asset risks, and pension- and asset planning.

SAVE VALUABLE TIME

Bridge automatically takes care of all documentation for you for each consultation. Specifically, your presentation, all added markers, notes and drawings from the presentation, as well as content shared via screen sharing (per screenshot) are recorded.

At the end of the on-line consultation, your client can immediately download the document in pdf format. All recorded information is additionally stored with the customer details in bridge, and can be accessed by the consultant in the cloud at any time.

TAPING

Starting August 1, 2020, the recording of conversations, according to FinVermV, will be possible with bridge, in compliance with DSGVO



FLEXIBLE CONSULTING FROM ANYWHERE

Bridge works both web- and cloud based. Customer data and documents stored with Bridge stored are retrievable and available to edit at any time - regardless of location and end device. For Bridge Business customers we are happy to set up an interface directly to the company's internal CRM system. This way all customer data is stored and synchronized in a central location. Thanks to integrated, interactive consulting guidelines, Bridge enables intuitive data acquisition with your clients during each consultation.

ADVANTAGES AT A GLANCE



All-in-one software solution:

- management of your customer contacts
- preparation and follow-up for your consultation
- Documentation of consultation
- Digital Signature



Digital Contract closures

- faster and more efficient
- work paperless
- no more need to print out contracts or documents
- increase sales
- save postage and travel money



At home & on-the-road consulting

- web & cloud based software
- work independently of your location thanks to our cloud library
- easy and stress-free communication with clients and potential customers



Sales through interaction

- instant individualized consultations
- clients can interact with consultants through drawing, mark-ups and notes
- increase persuasiveness
- increased competitive edge



Automated Documentation

- You save 8 working hours per week - added time for more customer consultations and meetings
- Consulting content, including all notes and drawings, is automatically saved for you
- you can digitally sign and send contracts via e-mail



No Installation needed

- start your consultation, any place, any time
- a web-based, hardware-independent Solution
- your customer does not need an account

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“Bridge is an important tool for us to present our properties to potential buyers, as we sell our projects during the construction phase. The possibility of also being able to carry out a consultation online is a significant advantage for our interested parties and us in terms of the flexibility of appointments. After an initial online presentation and the resulting extensive prior knowledge, the second appointment with interested parties is often more productive.”



Monique Rudiger

Sales management,
DORNIEDEN Group

”

“What’s special about the software that bridge offers, next to the very attractive and clean design, is the consistently thought-through, virtual consulting process that is oriented towards the customer. The dynamic range of adaptation of content that each consultant has is possible at any time, and the easy and good connection to on-line consulting is just one click away.”



Armin Christofori

Board member, spokesman for the
board / CEO , SDV service partner of
Versicherungsmakler AG

OUR PACKAGES

	BASIC	 PREMIUM Bestseller	BUSINESS (from 10 employees)
Screen-Sharing	✓	✓	✓
Multi-user video & text chat	✓	✓	✓
Automatic Documentation	✓	✓	✓
Directional function for consultant	✓	✓	✓
Prepare presentations	✓	✓	✓
Cloud library	✓	✓	✓
Live adjustment of the presentation	✓	✓	✓
Digital signature	—	✓	✓
Form Generator	—	✓	✓
Send virtual documents	—	✓	✓
Simple data acquisition	—	✓	✓
Personal support	—	✓	✓
Bridge Analytics	—	—	✓
CRM interface	—	—	✓
User and rights mangement	—	—	✓
Whitelabel solutions	—	—	✓
Training sessions	—	—	✓

Your Contact Person

bridge



Dr. Frederick Steinke **Chief Sales Officer**

T – 0049 351 318 75 76

E – frederick.steinke@bridge-systems.com

 **Bridge ITS GmbH**

Käthe-Kollwitz-Ufer 76
01309 Dresden

 0049 351 318 75 76

 info@bridge-systems.com

 www.bridge-systems.com



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Video consulting +

Free Trial Now!