HolaTitan

* HolaTitan is a salesforce community for independent agents. It allows them to have access to their sales, their progress and their commissions.
* This is the scaled down version of our Aurora SF CRM offered to our independent agents to manage their business
* HolaTitan is also integrates all salesforce functionality with our external platforms such as HolaMercury through our web services / webhooks.
* Trigger based processes to enable data transfers (files and emails) with the end user.
* Automatic creation of customer services cases within the SalesForce Service console through the

process builder.

* This platform is a CRM for the independent agent community.
* With Titan the agent can have all of their contacts, leads, notes, task, calendars, quotes and so much more in one single place.
* This platform is integrated with Salesforce.

HolaApollo

* HolaApollo is a scripting platform designed for fronting purposes.
* HolaApollo was designed for our Dominican Republic agents.
* The platform gives the Dominican Republic agents, the exact script they must use for the incoming call they’re receiving.
* We have 3 different versions of HolaApollo.
* Apollo Life: Used to front life and final expense calls.
* The calls are inbound and outbound. Leads come from our Google Ads campaigns.
* Apollo Health: Used to front outbound calls from Google ad and Facebook campaigns.
* Apollo Renewals: Used during OEP to front clients that were renewing their policies. (Most renewals came from our agent’s clients, email blast and SMS campaigns.
* This platform is integrated with Salesforce.

HolaAurora

* HolaAurora our CRM platform (salesforce)
* HolaAurora helps agents with their client’s data, bookkeeping purposes, and allows new clients experience a faster more efficient and automated sales process.
* HolaAurora has endless features to it from customized reporting to an interactive and enjoyable sales process for HolaDoctor’s agents.

HolaMercury

* Mercury is our leads marketplace, created to sell the overflow of calls from the HolaDoctor’s Call center to the HolaForce independent agents.
* An agent can login and chose the quality of lead they would like to purchase (Glass, Bronze, Silver, and Gold) and optionally filter by age, gender, spoken language, or state and purchase any of the results.
* Leads are priced on potential conversion rates with Gold leads existing for only 24 hours on the platform and a potential conversion rate of 30%
* Glass leads are our value product. Priced at one dollar, they are designed to move in bulk but with a potential conversion of 8%.
* All leads are fed from our Salesforce CRM directly to Mercury, and are updated and removed from the pool of available leads within Salesforce upon purchase.

HolaAres

* Ares is our Telemedicine product in partnership with HealthiestYou by Teladoc.
* It's a low-cost add-on offered to all customers when they purchase our core products, providing doctor's visits and prescription services over the phone or video-call.

HolaMurphy

* Murphy is our Direct to Consumer Accident product
* Guaranteed issue and coverage in less than three minutes with a simple form on the website customers can enroll enroll themselves and manage their policy from their customer portal

HolaGuard

* HolaGuard our internal accident product for our Independent Agents (Force)
* Agents are registered for an account which will then track all of their sold policies and maintain a visual history
* Agents are able to step through a simple five-step form to register a customer for an accident product offered in three packages with an optional add-on Telemedicine Bundle consisting of our Telemedicine Product (Ares) and a subscription to HolaMedRX and MiDieta apps.

HolaArtemis

* Artemis is a broker platform for other 3rd party agencies to sell accident products that have been designed for them in close partnership with the Palig team.
* It is a one-stop application where agents can enroll a new customer, see a history of sold policies, as well as charts of their production across time.
* It gives the 3rd party agency ability to manage users and locations, as well as offering differing level of role-based permissions such as Agents, Managers, or Admins.
* It offers the agency to set a custom agency fee in addition to the base premium, giving the agency greater control over their profit margins.
* The 3rd party agencies collect the premiums on their own, but upon request we offer a billing module where we handle all billing on the platform
* Along with billing we offer the option to handle all customer service interactions through a dedicated Artemis team, making this a full-service product we offer to 3rd party agencies.

Artemis Accreditation Tool

* The Accreditation Tool automates the agent appoint process by providing a near-instant background check and providing real-time status updates for where human intervention is needed during the appointment process.

HolaAthena

* Athena is our commissions management platform
* It allows for creation of custom commission structures per product as well as commission distribution rules by tier.
* Agents can then track their commissions, view/download commissions statements, and see visualization of their production across time.
* Administrators can also easily manage agencies and downline agents for proper commissions disbursal

HolaSky

* TPA(Third party administration system)
* Platformed design to sell Pan American’s life insurance product.
* Agents will be able to choose from a selection of products to sell
* The platform will keep track of all products sold as well as show visualizations of production across time.
* Allows administrators to post different banner ads based on location so agents will see different incentives based on their location when they log into the platform

QuotIt Services integration

* The origin of this project was born over the need of making the online health policy quoting/selling process an easier and more efficient endeavor for our Agents.
* What was achieved with the result of “QuotIt Services Integration” project was a single and integrated platform module within our SalesForce Org. to streamline the sales process.
* This project required SalesForce backend custom development, API interfacing with the Provider, Totalre-engineering of the Carriers and Products SalesForce database (with daily auto data updates) and a newcustomized UI that makes the execution of this complex process a simple and easy task for the final user, our agent.

HolaDialer