



# MARSH TEAM SITE EASY AND EFFICIENT ONLINE COLLABORATION



SOLUTIONS...DEFINED, DESIGNED, AND DELIVERED.



## The Challenge

- Can you easily find important information?
- Can you securely share large files electronically?
- Can you reliably track the status of outstanding items?
- Is your email inbox overflowing?

Managing an insurance program is an ongoing project that can generate a lot of information — submissions, proposals, policies, and more. Keeping track of everything and easily sharing documents with your Marsh team and underwriters can be a challenge.

## The Solution

Marsh TEAMSITE is a state-of-the-art collaboration tool, using widely adopted Microsoft Office and SharePoint technology. Marsh TEAMSITE allows secure sharing of information with team members worldwide, including insurers as appropriate.

The screenshot shows the Marsh TEAMSITE web interface. At the top, there's a navigation bar with 'BROWSE', 'FILES', and 'LIBRARY' tabs. Below the navigation is a toolbar with various document management icons: New Document, Upload Document, New Folder, Check Out, Edit Document, Discard Check Out, View Properties, Edit Properties, Version History, Alert Me, Popularity Trends, Download a Copy, Manage Copies, Go To Source, Send To, Workflows, Publish, Unpublish, Approve/Reject, Cancel Approval, Tags & Notes, and Share & Track. On the left, a sidebar menu includes 'Documents', 'NDAs', 'Projects', 'Claims', 'Account Management' (which is selected), '2017 Property Submission Policies', 'Site Contents', and 'EDIT LINKS'. The main content area shows a list of documents under 'Account Management'. The list includes:

NAME	DESCRIPTION	CREATED	CREATED BY
Non-Disclosure Agreements	...	July 12, 2016	Paul R. Harvey
Client Data Management Notes	...	June 29, 2016	Paul R. Harvey
Demo Company – Financial Statements 2017	Includes geographic and divisional revenue breakdown	September 15, 2016	Paul R. Harvey
Demo Service Team	Shows service team roles and contact information	September 15, 2016	Paul R. Harvey
Incident Reporting Form	Template form	October 19, 2016	Paul R. Harvey

On the right side of the interface, there are two promotional text blocks: '24/7 easy, secure access, to your insurance program Information.' and 'File sizes up to 100MB.'

## Who It's For

- Teams wanting to collaborate online.
- Clients with large files to share.

## Marsh TEAMSITE Features

Collaboration with your Marsh service team can be quick and easy – at no cost to you:

- **Easy to use:** The familiar Microsoft Office interface makes it easy to manage your files and organize document libraries and site pages.
- **Two-way file sharing:** Both you and your service team members can upload, download, and edit files, including files of up to 100MB that may be too large to email. You can also access a record of changes and previous drafts.<sup>1</sup>
- **Customizable alerts:** You can set alerts to notify you when content is updated or new content is added.
- **Secure access:** Your service team can customize security settings to restrict access as needed, such as granting insurers read-only access to renewal submissions.

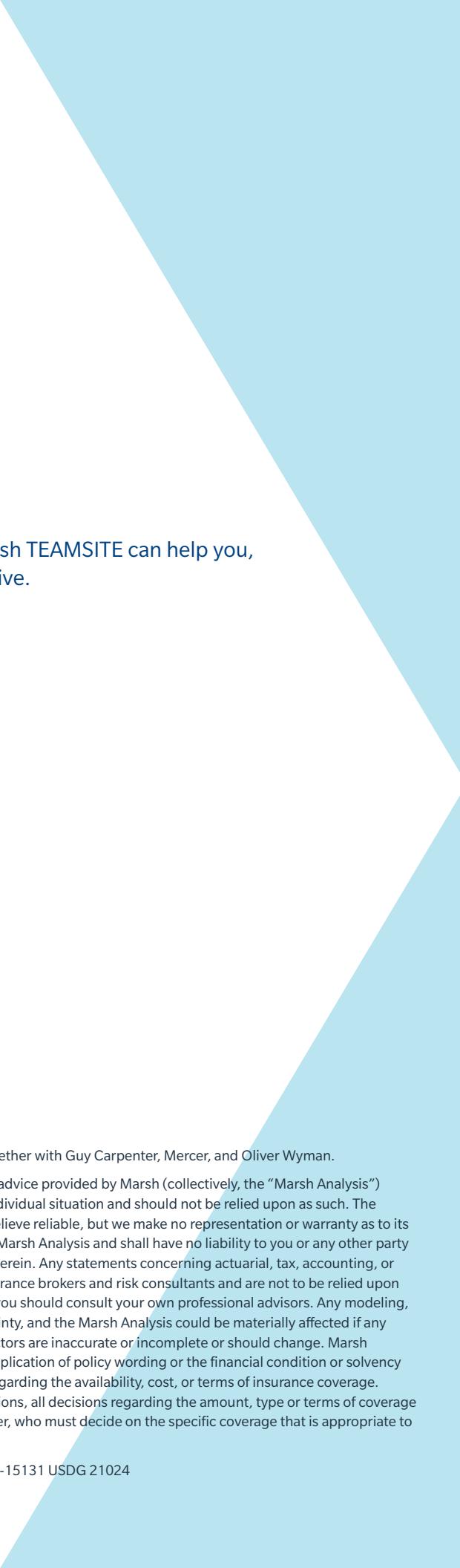
Many useful apps help teams work efficiently online, including:

-  **Contact lists** – quickly reach team members.
-  **Calendar** – manage key milestones.
-  **Open Items** – keep team aligned around progress on outstanding tasks and open issues.
-  **Quick links** – to important information.
-  **Wiki pages** – maintain an insurance manual of servicing procedures.

## Common Uses Include:

- Sharing key documents, such as policies, statements of values, and more.
- Gathering underwriting information and sharing read-only versions with insurers.
- Collaborating on presentations and reports.

<sup>1</sup> Note: Marsh TEAMSITE is not a permanent document storage solution, but it does provide collaboration capability for the duration of your transaction or project.



For more information about how Marsh TEAM SITE can help you,  
contact your local Marsh representative.

Marsh is one of the Marsh & McLennan Companies, together with Guy Carpenter, Mercer, and Oliver Wyman.

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