

Insurance Accelerator for Microsoft Dynamics

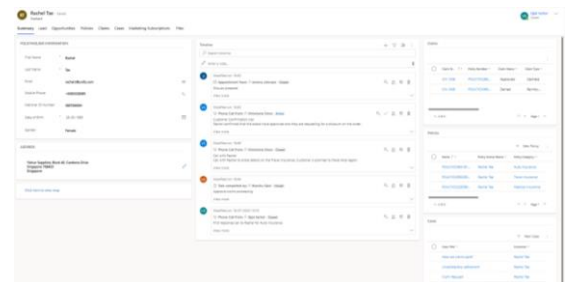
The Unify Dots' Insurance Management accelerator built on Dynamics 365 Customer Engagement helps sales teams manage pipelines for new policies and renewals. They can track lead sources and referrals and receive auto-reminders for policy renewals. Policy holders can get support through web portals or chatbots, initiate and track claims. Potential new customers can buy policies online with appropriate workflow based on the policy type. The contact centre team benefits from a 360-degree view of the policy holder in one system, including personal and contact details, inquiries, policies, claims, and cases thus improving first contact resolution time.

Product Features

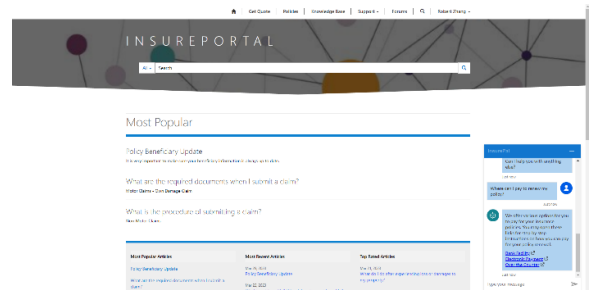
The Unified Insurance accelerator provides:

1. Tailored flows for the following processes:
 - a. Lead to policy process
 - b. Policy renewals process
 - c. Claim to settlement process
2. Ability to track policies by policy type, category, and validity.
3. 360-degree view of policy holders with their personal and contact details, policies and claim history, renewals and claims.
4. Policy details like coverages, riders, premium, insured and beneficiaries in a single view.
5. Ability for policy holders to inquire about a policy, or file a claim or complaint over a chatbot or portal.
6. Capability for automatic case creation from chatbot and email
7. Claim status on the customer portal.
8. Out of the box analytics and dashboards to track new insurance opportunities, renewals and both renewal and new policy goals to actuals.

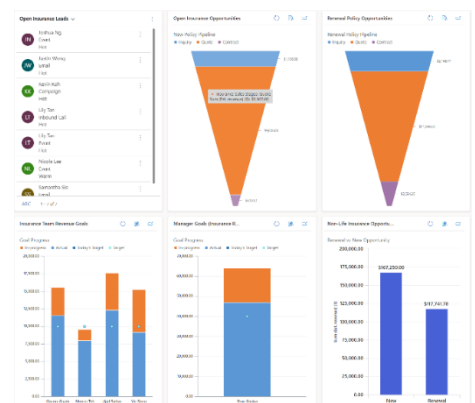
Platform: Unify Dots' Insurance Management solution is an insurance specific accelerator built on the Microsoft Dynamics 365 Sales and Customer Service applications and runs on the Microsoft cloud.



Insurance policy details and coverage summary in D365



Tailored support over portal and chatbot using D365



Sales Manager Dashboard to track policy renewals and new policy opportunities

Microsoft Dynamics 365 Contact Centre for Insurance

Dynamics 365 Contact Centre for Insurance is designed to meet the unique demands of the insurance industry by delivering a seamless, intelligent customer service experience. This platform empowers insurance providers to manage inquiries, claims, and policy updates across multiple communication channels with ease.

Key Functionalities include:

- **Omnichannel engagement support:** Customers can engage through their preferred channel—voice, SMS, chat, email, or social media, ensuring seamless communication for policy inquiries or claims.
- **Digital self-service:** Empower policyholders to self-serve via conversational chatbots for both voice and webchat, reducing response times for claims and policy details.
- **IVR:** Integrated IVR capabilities enable call queues, intelligent routing, and voicemail management, ensuring efficient handling of policyholder queries.
- **Intelligent Routing:** Intelligent routing directs calls and chats to the most appropriate agents, ensuring prompt assistance for claims or policy renewals.
- **Knowledge Management:** Built-in knowledge base helps agents quickly resolve customer queries about policies or claims.
- **Teams Collaboration:** Seamless Microsoft Teams integration enables agents to collaborate on complex cases or policy updates via voice and chat.
- **Call Recording and Transcription:** Record calls automatically or on-demand with full voice-to-text transcription for claims verification and regulatory compliance.
- **Sentiment analysis:** Monitor customer sentiment on voice and chat channels, providing early alerts on potential dissatisfaction during claims processing.
- **Service Reports and Dashboards:** Real-time and historical dashboards offer insights into agent performance, customer satisfaction, and service metrics out of the box.

Key Benefits

The Unified Insurance solution provides the following benefits to Insurers

1. Better tracking of strong sales performers versus weak ones.
2. Automated lead capture for basic information like policy type, customer profile information to reduce sales handling time and ensure salesperson has a targeted conversation with the prospective customers.
3. Simplify contact centre management by providing an all-in-one solution.
4. Improved customer engagement through consistent communication across multiple channels.
5. Improvement in customer satisfaction by providing self-service capabilities.
6. Reduction in policy renewal costs by leveraging chatbots, a policy holder portal and a rich knowledge base that provide information to a customer. The chatbots also help with an assisted renewal by leveraging the AI built in the CoPilot solution.
7. Ensure customers are connected with the right expert, improving first-call resolution.
8. Streamlined operations by optimizing workflows and reducing redundancies within the insurance solution.
9. Enhanced decision-making with comprehensive customer profiles and case management tools for tailored services.



Unifying the Dots in your Business



About Unify Dots

Unify Dots helps you connect the Dots by providing business solutions that enable digital transformation. Unify Dots specializes in CRM, Customer Service, Customer Insights, Ecommerce, ERP, Order Management, Field Service, Inventory, Procurement, Project Operations, Marketing Automation, Sales Automation, Supply Chain, Point of Sale, and Warehouse Management solutions.



Unify Dots operates in Asia Pacific, Australia, New Zealand, Europe, North America and across the globe with a local touch. Unify Dots is also committed to improving the world and has pledged donating at least 25% of its profit towards the case of helping educate children from low-income families in developing countries.

More Information is provided below. To request a demonstration email us at info@unifydots.com

Contact Unify Dots

Email us at info@unifydots.com to get more information on implementing the Unify Dots' Insurance solution or contact us by calling one of our office locations or visit us at <https://unifydots.com>

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