

# 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.

## 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.



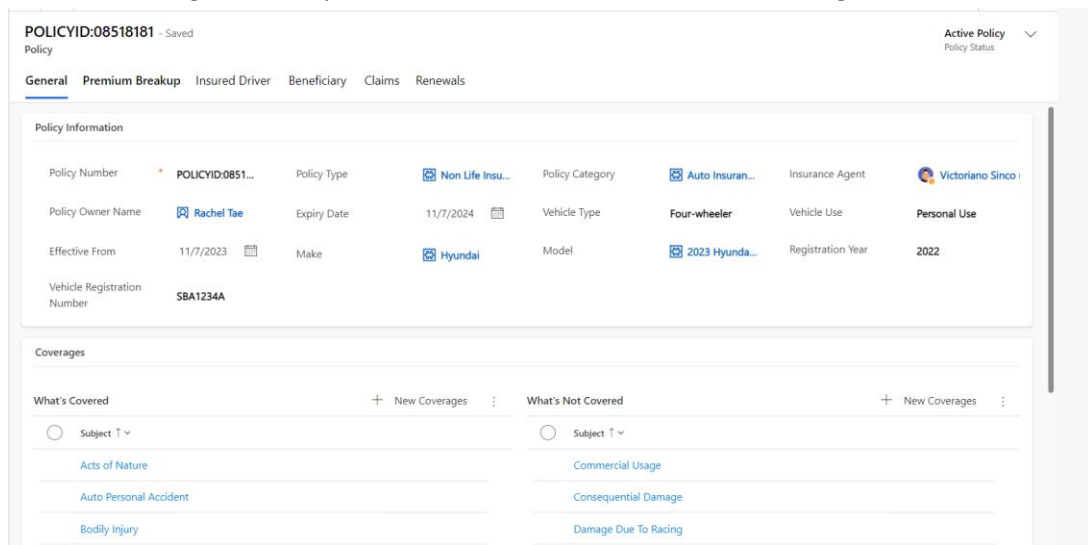
Unify Dots operates in Asia Pacific, Australia, New Zealand, Europe, North America and across the globe with a local touch. Unify Dots is also committed to improving the world and has pledged donating at least 25% of its profit towards the cause of helping educate children from low-income families in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

More Information is provided below. To request a demonstration email us at [info@unifydots.com](mailto:info@unifydots.com)

## 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. Policy details like coverages, riders, premium, insured and beneficiaries in a single view.



**POLICYID:08518181 - Saved** Active Policy Policy Status

**General** Premium Breakup Insured Driver Beneficiary Claims Renewals

**Policy Information**

|                             |                  |             |                  |                 |                 |                   |                  |
|-----------------------------|------------------|-------------|------------------|-----------------|-----------------|-------------------|------------------|
| Policy Number               | POLICYID:0851... | Policy Type | Non Life Insu... | Policy Category | Auto Insuran... | Insurance Agent   | Victoriano Sinco |
| Policy Owner Name           | Rachel Tae       | Expiry Date | 11/7/2024        | Vehicle Type    | Four-wheeler    | Vehicle Use       | Personal Use     |
| Effective From              | 11/7/2023        | Make        | Hyundai          | Model           | 2023 Hyunda...  | Registration Year | 2022             |
| Vehicle Registration Number | SBA1234A         |             |                  |                 |                 |                   |                  |

**Coverages**

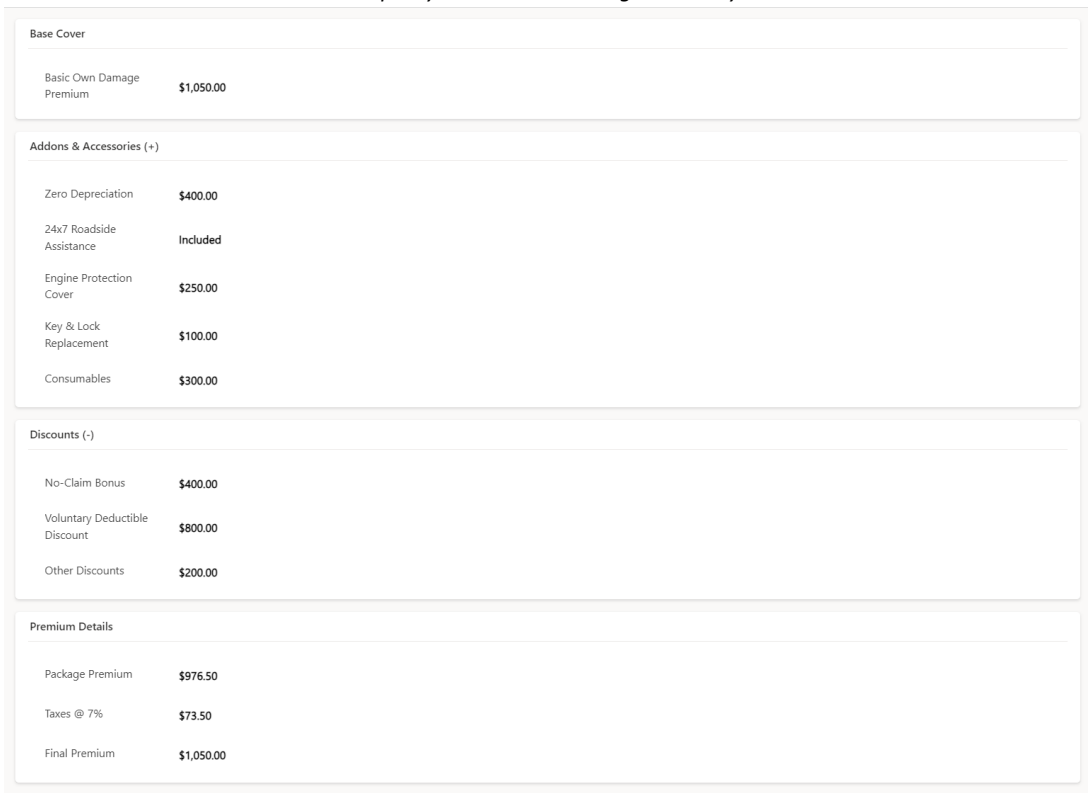
**What's Covered** + New Coverages

- Subject
- Acts of Nature
- Auto Personal Accident
- Bodily Injury

**What's Not Covered** + New Coverages

- Subject
- Commercial Usage
- Consequential Damage
- Damage Due To Racing

Insurance policy details and coverage summary in D365



**Base Cover**

|                          |            |
|--------------------------|------------|
| Basic Own Damage Premium | \$1,050.00 |
|--------------------------|------------|

**Addons & Accessories (+)**

|                          |          |
|--------------------------|----------|
| Zero Depreciation        | \$400.00 |
| 24x7 Roadside Assistance | Included |
| Engine Protection Cover  | \$250.00 |
| Key & Lock Replacement   | \$100.00 |
| Consumables              | \$300.00 |

**Discounts (-)**

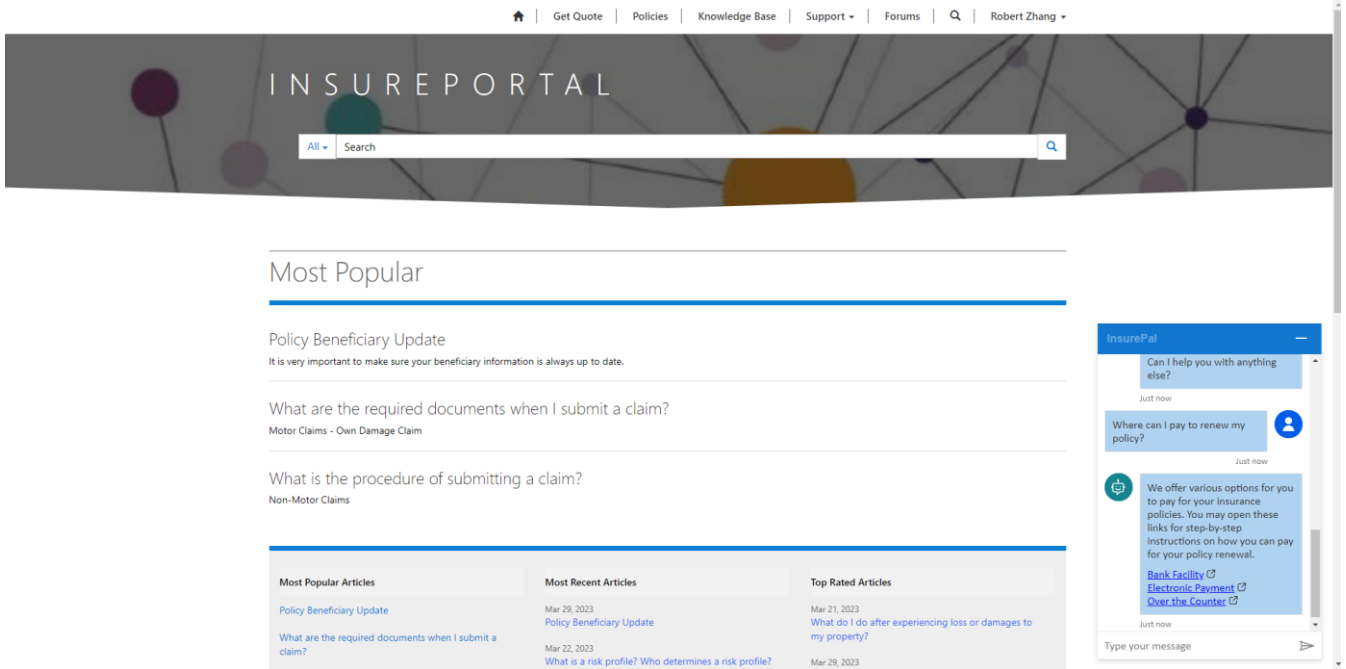
|                               |          |
|-------------------------------|----------|
| No-Claim Bonus                | \$400.00 |
| Voluntary Deductible Discount | \$800.00 |
| Other Discounts               | \$200.00 |

**Premium Details**

|                 |            |
|-----------------|------------|
| Package Premium | \$976.50   |
| Taxes @ 7%      | \$73.50    |
| Final Premium   | \$1,050.00 |

Image: Policy Premium

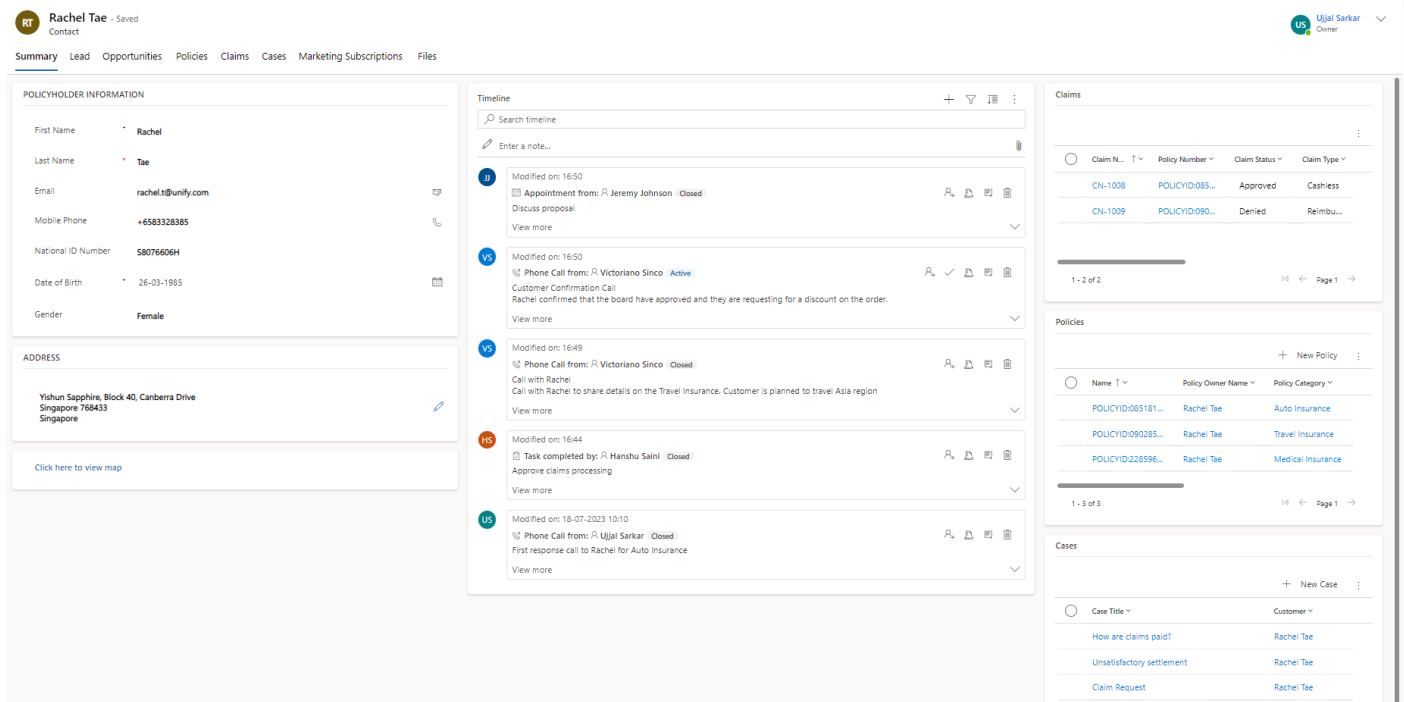
4. Ability for policy holders to inquire about a policy, or file a claim or complaint over a chatbot or portal.
5. Capability for automatic case creation from chatbot and email



The screenshot shows the 'INSUREPORTAL' website. At the top, there's a navigation bar with links: Home, Get Quote, Policies, Knowledge Base, Support, Forums, and a search icon. Below the navigation bar is a large banner with the text 'INSUREPORTAL' and a search bar. The main content area is titled 'Most Popular' and lists several articles: 'Policy Beneficiary Update', 'What are the required documents when I submit a claim?', and 'What is the procedure of submitting a claim?'. On the right side, there's a chatbot interface titled 'InsurePal' with a message: 'Can I help you with anything else?'. The chatbot also displays a message about policy renewal options and a link to 'Bank Facility Electronic Payment Over the Counter'.

*Tailored support over portal and chatbot using D365 and Power virtual agents*

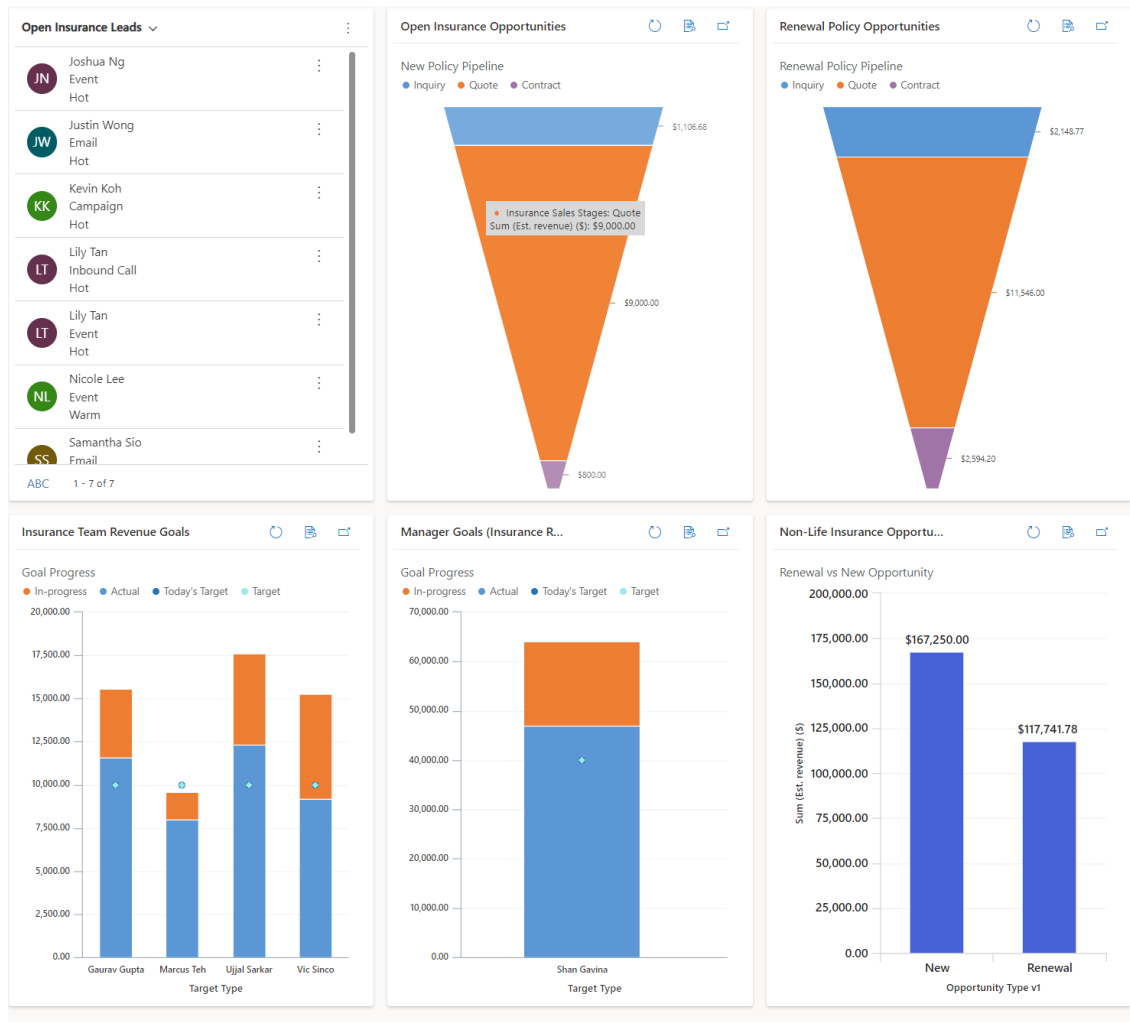
6. Claim status on the customer portal.
7. 360 degree view of policy holders with their personal and contact details, policies and claim history, renewals and claims.



The screenshot shows the D365 customer portal for a policyholder named Rachel Tae. The left sidebar contains a 'POLICYHOLDER INFORMATION' section with fields for First Name, Last Name, Email, Mobile Phone, National ID Number, Date of Birth, and Gender. Below this is an 'ADDRESS' section with a map link. The main content area is divided into three sections: 'Timeline', 'Claims', and 'Policies'. The 'Timeline' section shows a list of events, including 'Appointment from: R Jeremy Johnson', 'Phone Call from: R Victoriano Sinco', and 'Task completed by: R Hanshu Saini'. The 'Claims' section shows a table with columns for Claim No., Policy Number, Claim Status, and Claim Type. The 'Policies' section shows a table with columns for Name, Policy Owner Name, and Policy Category. The 'Cases' section shows a table with columns for Case Title and Customer.

*Policyholder 360 degree view showing policies, claims, cases in D365*

- Out of the box analytics and dashboards to track new insurance opportunities, renewals and both renewal and new policy goals to actuals.



Sales Manager Dashboard to track policy renewals and new policy opportunities

**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.

## Key Benefits

The Unified Insurance solution provides the following benefits to Insurers

- Improvement in customer satisfaction by providing self-service capabilities.
- Reduction in operating costs by automating customer support through chatbots and virtual agents.
- 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
- Beter tracking of strong sales performers versus weak ones.
- Automated lead capture for basic information like policy type, customer profile information to reduce sales handling time and ensure sales person has a targeted conversation with the prospective customers.



*Unifying the Dots in your Business*



### 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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