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.

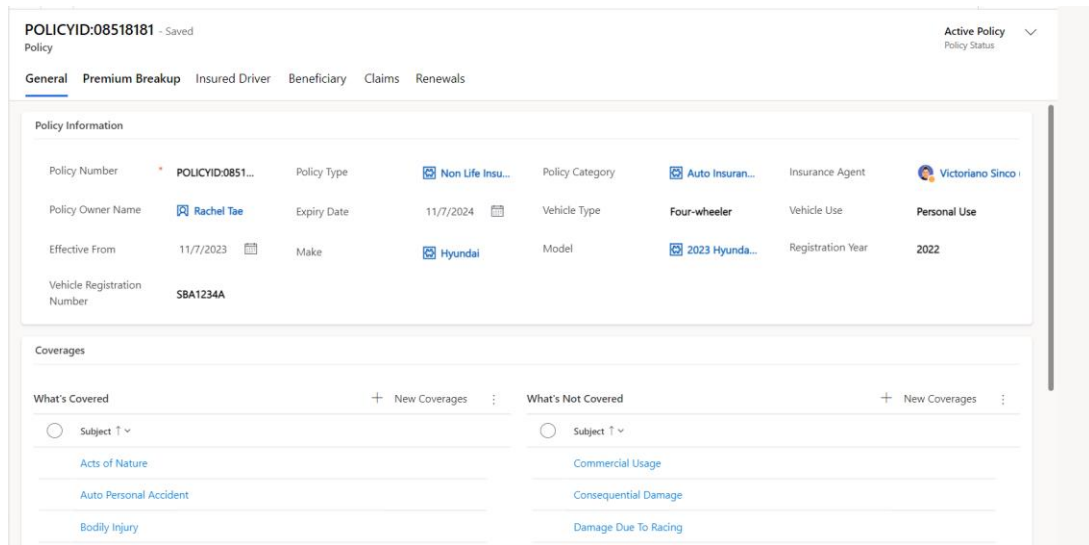|			
Finance, Accounting, Treasury, Budgeting, Financial Reporting	Supply Chain, Order Management, Manufacturing and WMS	CRM: Sales, Service, Field Service	Human Resources Management and Talent
Project Operations	Data Analytics and Business Intelligence	Customer Experience - Customer Data Platform and Marketing	Ecommerce and Retail / Point of Sale
Low Code Applications and Workflows	Mobile Order Entry and Mobile App Dev	Manual Quality Assurance and Automated QA	Contract Management Software

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

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.

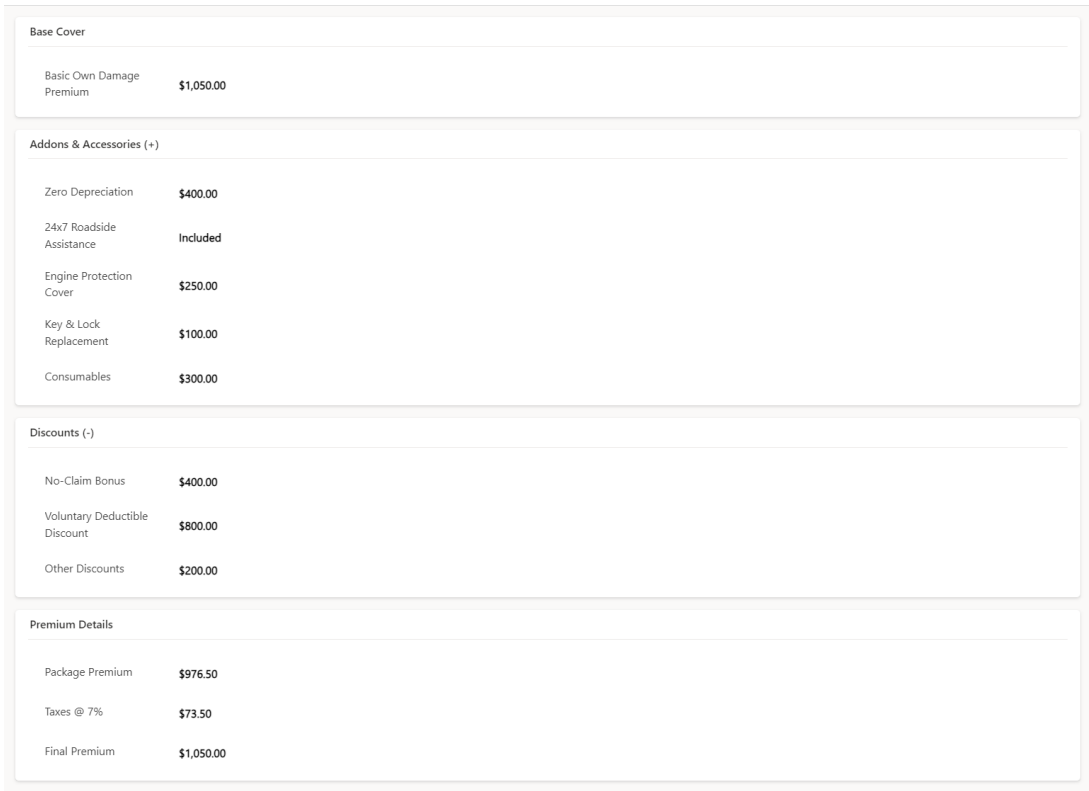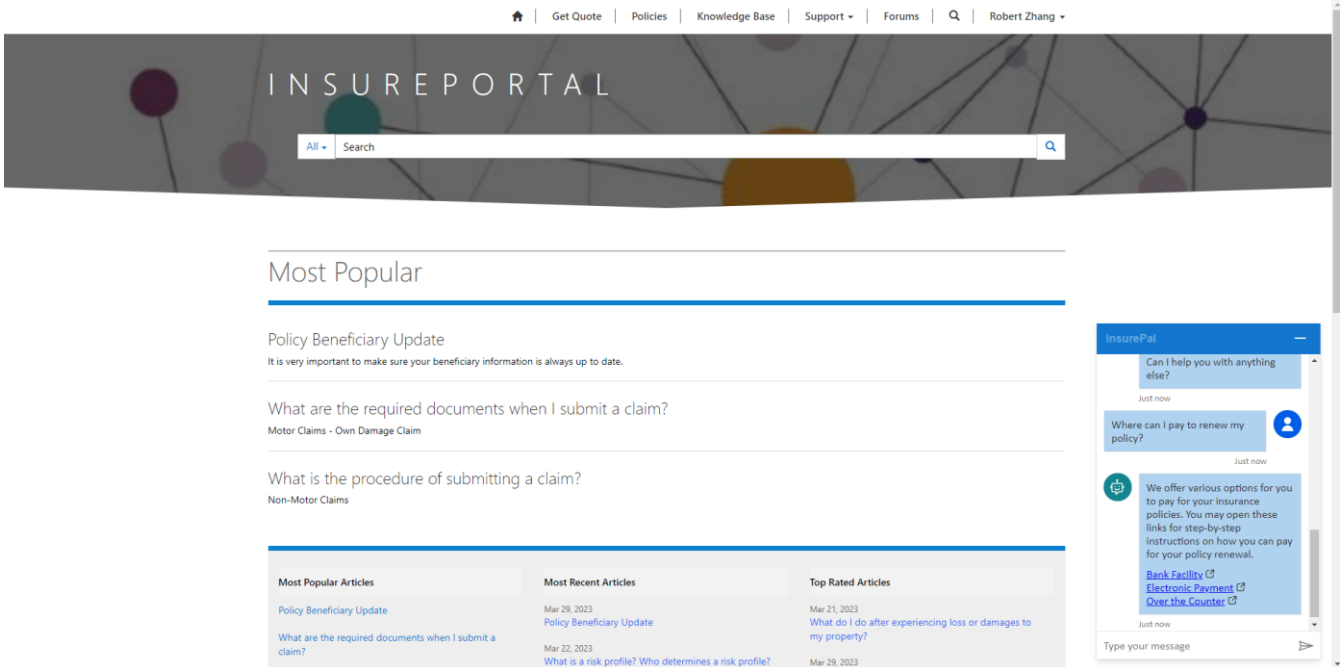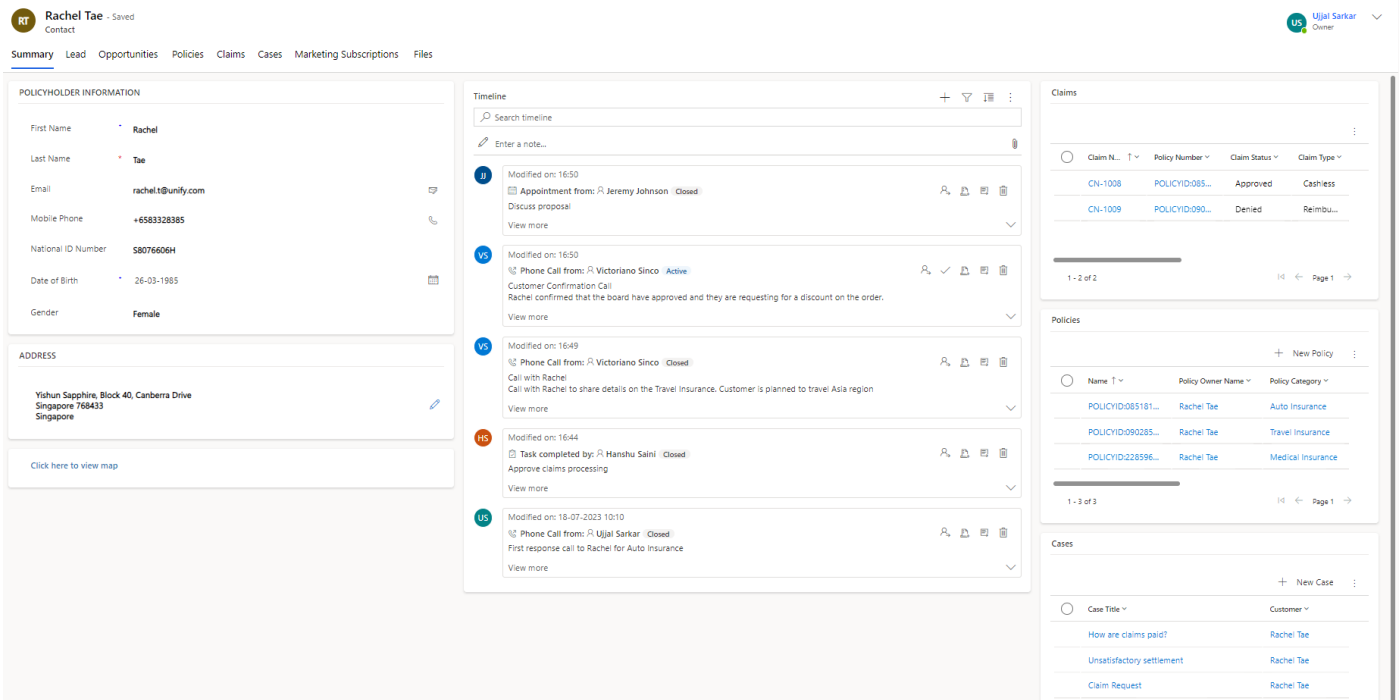*Insurance policy details and coverage summary in D365*

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

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.
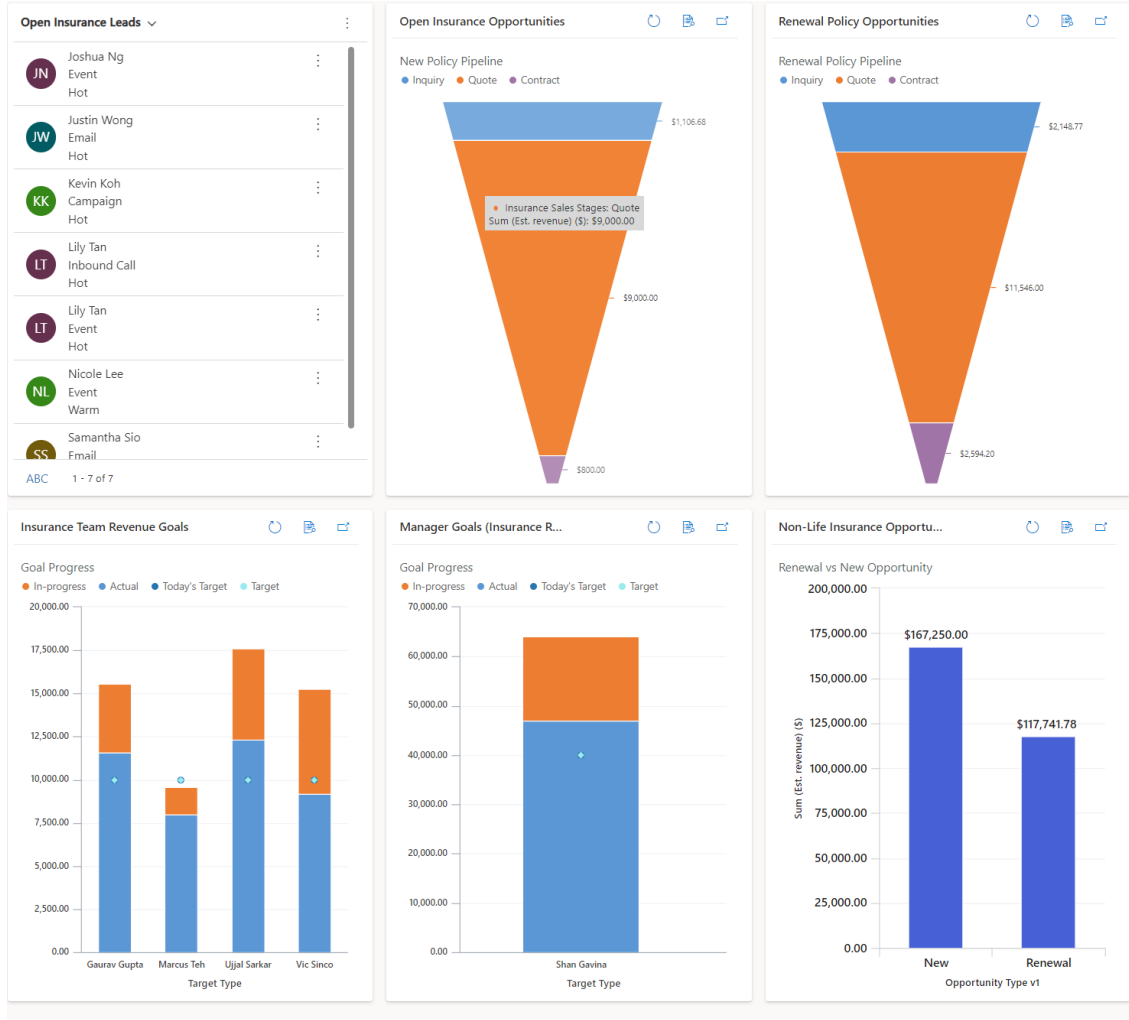

Policyholder 360 degree view showing policies, claims, cases in D365

8. 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
1. Improvement in customer satisfaction by providing self-service capabilities.
2. Reduction in operating costs by automating customer support through chatbots and virtual agents.
3. 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
4. Beter tracking of strong sales performers versus weak ones.
5. 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.

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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