



**1 m+ clients;
93% claim settlement ratio;
1 Goal: interweave digital
ecosystem for agents/
partners**

Time lost in insurance is business lost. With limited digital outreach and extensive dependency on conventional business practices, our client could not help their agents and partners achieve performance excellence — while working remotely — and keep up with the pace required to serve customers amidst crises such as COVID-19. So when the client wanted to interweave a digital ecosystem for employees, agents, and partners, we helped them lean on technology strings to tie up loose ends and roll on high-performant business continuity wheels.

Snapshot

Challenge: Stagnant agent productivity and derailed processes; Inconsistent agent journey and broken experiences due to COVID-19; Minimum digital presence and significant technology deficit.

Solutions: Harnessed mobility and built comprehensive agent toolkit; Offered connected insurance experience to smoothen and accelerate end-to-end agent journey amidst lockdown and social distancing; Consolidated digital channels and Integrated technology inspired approaches.

Benefits: Increased sales and revenue; Improved productivity; Reduced policy issuance time; Enhanced customer outreach.

Key Challenges

1. Manual - and paper-based business practices kept agents and partners from achieving agency targets, issuing policies in the shortest possible time, and leveraging long-term customer relationship benefits.
2. Lack of a responsive and connected ecosystem delayed regular business functions, weakened agents' and partners' decision-making abilities, and thwarted endeavors to augment experiences and make the agent journey seamless.
3. Fragmented platforms and disparate digital assets slowed the top-line growth. The inability to structure, organize, manage, and process data due to technology deficiency, stopped the client from pursuing data-driven development.

Our Solution

We built feature-rich mobility solutions stuffed with comprehensive technology-inspired tools that enabled agents to carry out their functions seamlessly, both online and offline. From accessing product details and ensuring compliance with regulatory standards to upload/download relevant documents, agents could flawlessly perform diverse tasks while remaining connected to a central-ized platform anytime, anywhere. With digital as the code of their practice, the solution supported agents in ensuring that proposers meet all the precedent conditions before getting a certificate of insurance.

We integrated a configurable premium calculator that further made the solution ideal for agents by helping them prevent inconsistent experiences — concerning assisting customers in calculating premiums against every product — and complete their journey towards attaining effective customer onboarding. We built remote working models that helped agents and partners achieve consistent performance even in crises such as COVID-19. They could remotely connect to customers, drive data-driven actions, and make efficient decisions while enhancing service standards to provide customers with reasonable fidelity to turn into proposers.

We leveraged the API Integration approach to help the client build a connected ecosystem and feed their data growth and success. The integration helped make marketing collaterals and promotional data readily available for the agents and partners to access and share through a centralized dashboard. We designed and implemented bancassurance architecture to help the client, agents, and partners widen their customer outreach by collaborating with banks and monetizing their cus-tomer database. We helped build a consolidated, connected, and data-driven organization to offer enterprise-wide visibility, provide better operational control, and achieve total digital transformation.



Our client is a leading financial and insurance services provider in India with a presence in over 400 cities and serving more than 1.1 Million clients — through its subsidiaries — across 1275 locations. The client is a multi-award winner company listed in the country's top stock exchanges and renders their services, specifically in lending, retail broking, and health insurance.

Business Benefits

- Accounted for 80% of the sales
- Operational costs reduced by 20%
- Ensured remote connectivity with clients
- Reduced dependency on paper-based work
- Enabled real-time update of customer & partner portals

Outcomes included

- **80% reduction in policy delivery time**
- **1800+ policies issued in a day**

We can't wait to tell you more

Whatever business you're in, whatever problem you have, we have the experience and together we can create a solution. All you have to do is contact us when you're ready to experience...

"Infinite Possibilities with Technology"



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