Mobilize your Insurance Sales Process from Lead to Policy
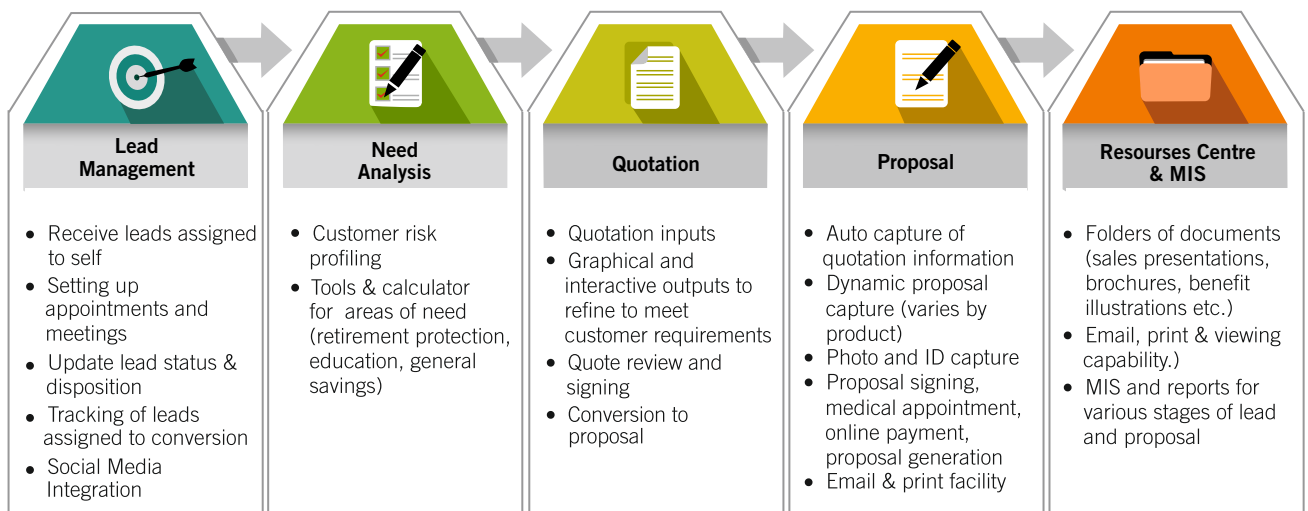
In the short term (next 2 to 3 years), insurers will find greater business impact with mobile investments that are targeted at agents/brokers and service supply partners. Not only will they satisfy partner technology demands but mobile use will reduce the transaction cost by more than 30% and reduce the handling time by 50%. Short-term mobile investments will produce ROI such as operational efficiency, faster transaction processing and cost savings. These benefits will have an indirect effect on customers such as driving improved customer satisfaction through faster claims processing and policy issuance — both of which have been proved to be major complaints of insurance consumers based on industry studies.

Responding to growing demands by agents is the first line of defense to preserving revenue by keeping them loyal and satisfied. Therefore, this is more than just ROI; it is loss prevention for insurers operating with agent/broker channels.
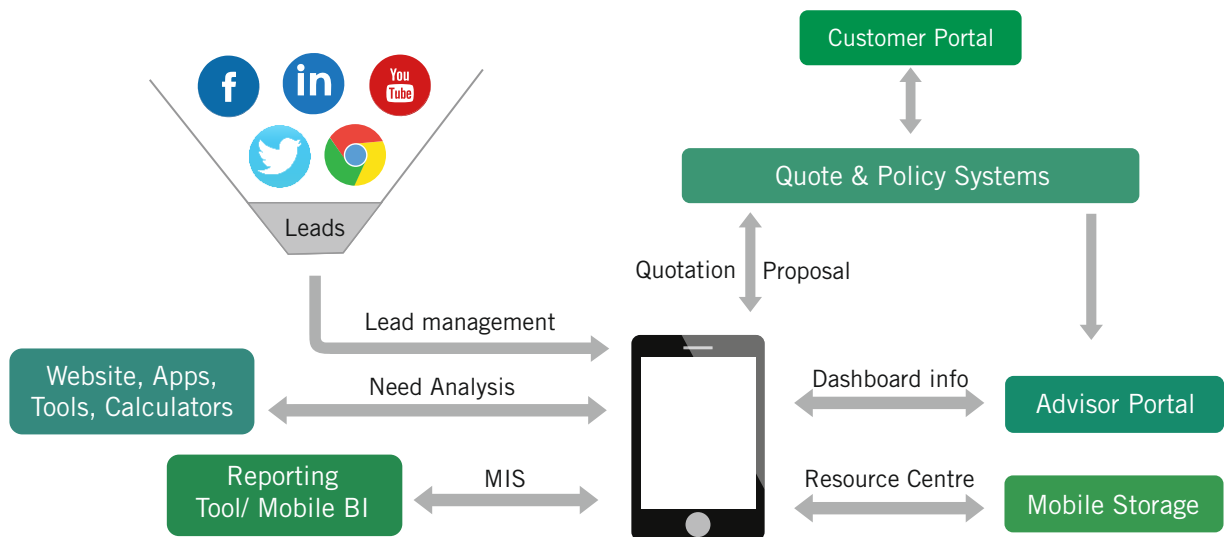
The Mobile sales force app will enable users to:

- Manage, track and update leads
- Do a need analysis of the prospect using tools and calculators
- Create an Insurance quote and convert to proposal
- Proposal form filling, doc collection and signing, premium payment policy issuance
- Provide informative content and key MIS at various stages

The Happiest Minds Mobile App Solution is comprehensive, robust and covers the entire life cycle right from generation of a lead to policy issuance

Lead Management	Need Analysis	Quotation	Proposal	Resourses Centre & MIS
• Receive leads assigned to self • Setting up appointments and meetings • Update lead status & disposition • Tracking of leads assigned to conversion • Social Media Integration	• Customer risk profiling • Tools & calculator for areas of need (retirement protection, education, general savings)	• Quotation inputs • Graphical and interactive outputs to refine to meet customer requirements • Quote review and signing • Conversion to proposal	• Auto capture of quotation information • Dynamic proposal capture (varies by product) • Photo and ID capture • Proposal signing, medical appointment, online payment, proposal generation • Email & print facility	• Folders of documents (sales presentations, brochures, benefit illustrations etc.) • Email, print & viewing capability.) • MIS and reports for various stages of lead and proposal

The Mobile salesforce app Linkage with your IT Architecture:

Leads

Lead management

Need Analysis

Website, Apps, Tools, Calculators

Reporting Tool/ Mobile BI

MIS

Quotation | Proposal

Customer Portal

Quote & Policy Systems

Dashboard info

Advisor Portal

Resource Centre

Mobile Storage

Key business benefits

- Substantially increase sales planning accuracy by three folds
- Get to meet 30% additional customers
- Reduce back office updates to one fourth of the time spent
- Heavily reduce travel times to customer destinations by more than 40%
- Standardization of sales process
- Lower drop-out rates
- Increased and easier compliance
- Paperless processing

Platform & Device Compatibility

- The Mobile SFA Solution is compatible with any mobile device namely smartphones, tablets, laptops, etc
- Supports multiple mobile platforms (iOS, Android, Windows) and CRM systems and also available in modules based on usages

About Happiest Minds Technologies

Happiest Minds, the Mindful IT Company, applies agile methodologies to enable digital transformation for enterprises and technology providers by delivering seamless customer experience, business efficiency and actionable insights. We leverage a spectrum of disruptive technologies such as: Big Data Analytics, AI & Cognitive Computing, Internet of Things, Cloud, Security, SDN-NFV, RPA, Blockchain, etc. Positioned as "Born Digital . Born Agile", our capabilities spans across product engineering, digital business solutions, infrastructure management and security services. We deliver these services across industry sectors such as retail, consumer packaged goods, edutech, e-commerce, banking, insurance, hi-tech, engineering R&D, manufacturing, automotive and travel/transportation/hospitality.

Headquartered in Bangalore, India Happiest Minds has operations in USA, UK, The Netherlands, Australia and Middle East.

To know more about our offerings. Please write to us at
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