CLIENT COLLABORATION

SEAMLESS & SHARED E-APP CONSUMER EXPERIENCE

Consumer expectations have changed dramatically, demanding new levels of privacy and selfservice convenience. With Client Collaboration, carriers can help their distribution channels meet or exceed their clients' expectations as they journey through the life insurance application process, while agents remain in full control.

A CONSUMER-FRIENDLY, PRIVATE EXPERIENCE

Client Collaboration is an exciting solution that enables both your agents and consumers to share in your application process. Agents gain the flexibility to virtually or physically hand over the application to their clients for confidential completion, resulting in a more consumer-friendly, private experience. Any apprehension stemming from very personal conversations about the consumers' medical history and lifestyle are eliminated, while increasing the potential of reliable data for underwriting.

A SEAMLESS BRAND EXPERIENCE

Clients are guided through your application process with a seamless brand experience, digitally engaging at anytime, anywhere, on any device. They complete their part of your e-App, returning the process to the agent or submitting the completed case. Flexible workflows also enable clients to complete Part 2 medical questionnaires independent of the application process.
Enhance your Agent/Client experience by offering a consumer-friendly approach that can significantly improve sales cycles and build a trustworthy relationship.

KEY FEATURES

- Easily integrates with your automated underwriting solution for instant decisioning
- Consumer-friendly, convenient service - anytime, anywhere (e.g. time, processing / fulfillment)
- Supports Customer Experience (CX) objectives with a carrier-branded UX (User Experience)
- Improved data collection with an easy e-App process
- Enables both face-to-face and virtual customer engagement for e-App completion
- Agent-initiated or call center, via full e-App or drop ticket
- Integrates with your organizations marketing stack (i.e. email notification tools)
- Highly configurable to meet your workflows and requirements
- Multiple authentication options available (carrier portal, social media, multi-factor)

KEY BENEFITS

- Higher placement ratio via collaboration
- Enhances the socially distanced sales experience
- Agent remains empowered and in control of the sale
- Improves sales and underwriting cycle times when implemented with instant and/or same-day approvals
- Increases brand engagement with your customers
- Streamlines the e-App process by providing consumer self-sufficiency
- Allows consumers to independently complete any portion of their application
- Increases consumer comfort in sharing their lifestyle and medical history