Agent Advantage™ for Salesforce

The *Insurance Sales Agent* supports customers by providing personalized recommended property insurance options.

BUSINESS CHALLENGE

When a current client has one type of insurance policy but does have other complementary policies, the insured has an opportunity to cross-sell and bundle the additional policy with the client's existing coverage, offering enhanced protection and potential savings. However, this process must be seamless, persuasive, and efficient, while handling the complexities of policy customization and human agent participation.

AGENTIC SOLUTION

The Insurance Sales Agent identifies upsell & cross-selling opportunities and presents customized home insurance options tailored to client's property size, and documents conversations under each opportunity.

VALUE PROPOSITION

Improved customer experience:
Guided process makes it easier for customers to explore additional insurance options. Clear explanations of bundling benefits and seamless transitions to human agents create a hassle-free experience.

Tailored Coverage Solutions
Personalized recommendations based on individual client profiles enhance decision-making, ensuring that customers receive the most relevant and cost-effective insurance solutions tailored to their unique needs.

İncreased operational efficiency:
Cross-selling opportunities: identifying gaps in a customer's existing coverage allows the company to maximize revenue by offering relevant products. A proactive approach with digital agent ensures customers are aware of valuable options, increasing policy uptake.

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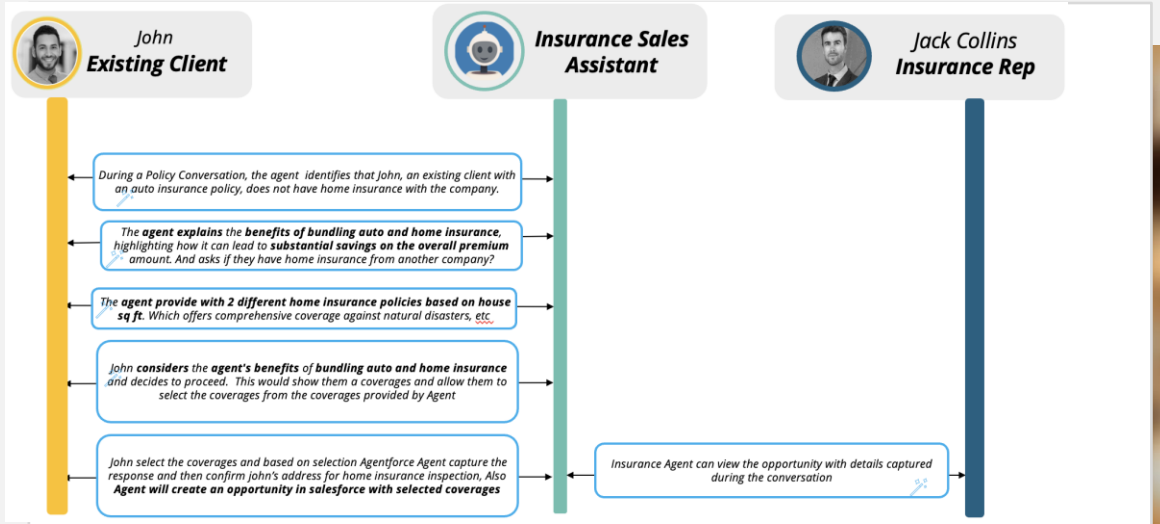
AGENT CAPABILITIES

Customer policy review & identification:
The agent reviews client's auto policy and identifies the absence of home insurance.

Customization of Insurance options:
The agent tailors home insurance options based on the client's specific needs & characteristics , ensuring personalized coverage.

Offer presentation:
The agent explains the benefits of bundling home and auto insurance, emphasizing premium savings.



ILLUSTRATIVE INTERACTION FLOW

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Agent Advantage™ for Salesforce

The *Policy Service Agent* helps P&C insurance customers add or remove drivers and vehicles on their policy.

BUSINESS CHALLENGE

Adding a vehicle to an existing policy for P&C insurance has traditionally relied heavily on phone calls or online interactions. Policy holders often connect with a live agent over the phone to update their policy details. This conventional approach presents challenges such as long wait times, potential errors in data entry, and inefficiencies in communication, leading to delays and frustration for policyholders seeking timely updates to their coverage.

AGENTIC SOLUTION

The Policy Service Agent revolutionizes policy holder service by streamlining the process for making policy updates (i.e., adding a vehicle or driver) through an intelligent, customer-centric chat interface. This solution empowers P&C insurance companies to deliver personalized and efficient service, ensuring they can retain more of their policyholders.

VALUE PROPOSITION

Tailored insurance experience:
Provides a personalized experience to policyholders to help them add a driver or vehicle to their policy and receive an updated quote.

Enhanced customer engagement:
Improves customer engagement, fostering a stronger brand relationship to ensure customer retention and improved customer lifetime value.

Efficient policy updates:
Streamlines the quoting and policy update processes, saving time for both customers and insurance companies and reducing administrative burdens.

Data-driven insights:
Data can also be used to provide valuable insights for insurance companies to optimize their operations and improve service outcomes.

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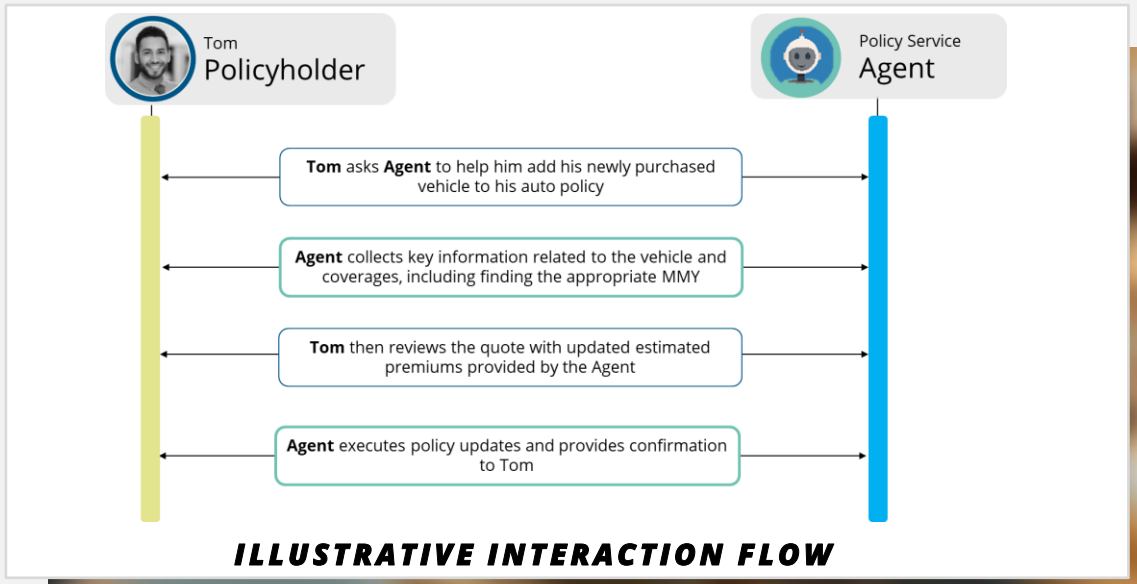
AGENT CAPABILITIES

Vehicle search:
Agent finds appropriate make, model, and year based on VIN or user input.

Quoting:
Agent provides a quote for the updated policy with the new vehicle or driver added.

Information collection:
Agent collects information related to the policy updates the user would like to make.

Policy update:
Agent executes the policy updates and provides confirmation to the user.



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