



# Omnichannel Customer Engagement (CCM) *for Insurance*

## Overview

Insurers generate a wide variety of communications to interact with their customers. It encompasses policies, proposals, forms, notices, endorsements and renewals, claims, annual and portfolio statements, bills, and more. However, when it comes to rolling out these communications, legacy systems, various business applications, and fragmented document creation systems pose barriers, leading to inconsistencies in the process.

The new-age customers expect a personalized experience across all digital and traditional channels, including e-mail, social media, web, push notifications, SMS, mobile, print, and fax. Thus, insurance companies must have a strong customer communication platform that can help them connect with every customer by delivering personalized, targeted, and consistent communications across all touchpoints.

## Key Challenges

- High printing and mailing costs for customer-facing communications
- High turnaround time due to manual creation of documents, letters, e-mails, and more
- Consolidation of information from multiple systems into a single customer statement
- Unsecured communications without digital signatures, and password protected PDFs
- Inability to track communication delivery and response
- Ad hoc document generation from the web, mobile, and e-mail
- Lack of multi-lingual communications
- Absence of a centralized template repository, leading to inconsistent branding



## Increase Share of Wallet with a Robust Omnichannel Customer Engagement Platform



Omnichannel Customer Engagement platform enables insurers to streamline enterprise-wide communications and reach out to their target audience across various engagement channels. By leveraging the platform, insurers can roll out high-volume operations documents, one-to-one customer communications, and on-demand communications across multiple channels without having to replace their legacy systems. It allows business leaders to manage customer-facing communications while enhancing acquisition and retention rate and increasing the share of customers' wallets.

## Deliver Different Insurance Communications with CCM

The platform offers future-ready capabilities for collaborative designing, reviewing, and archival of insurance communications

- **High-volume Operations Documents**

Generate, schedule, and monitor structured, high volume documents, such as premium payment notifications, annuity statements, and renewal reminders

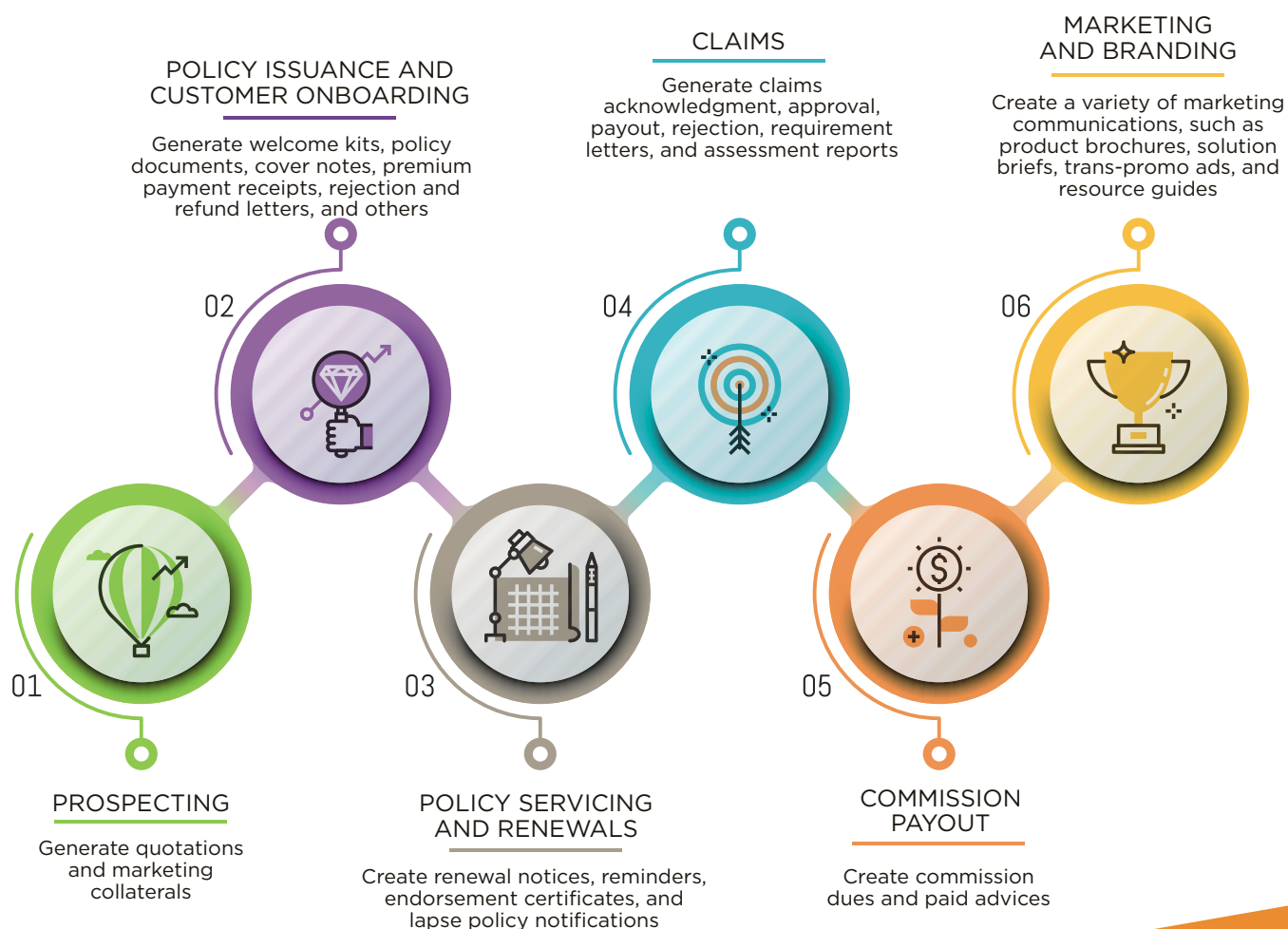
- **One-to-one Customer Communication**

Edit pre-filled documents, such as welcome kits, representation contracts, policy documents, acknowledgment letters, quotes, proposals, and a host of other communications in real-time

- **On-demand Communications**

Fetch communications directly from website, mobile or business applications, such as online premium receipts, online premium computation, quote generation, and insured ID cards

## How the OmniOMS Platform Helps Across Insurance Lifecycle Stages







## Reduce Operational Costs

- Streamline communications through end-to-end automation and standardization; cut-down on paper and postage costs
- Decrease call-center volume for on-demand communication generation by a significant margin



## Strengthen Customer Base

- Improve the ability to target and tailor new offers to enhance up-sell and cross-sell opportunities
- Acquire customers faster by rolling out proposals and quotations in real-time



## Enhance Customer Experience

- Enable customers to access documents anytime, anywhere via self service
- Reduce wait time and minimize errors for front-office communications



## Improve Compliance

- Ensure compliance through rule-driven, yet highly customizable customer communications delivered across multiple channels
- Enhance information security and capture audit trail of the complete document handling process



## About Newgen

Newgen is the leading provider of a unified digital transformation platform with native process automation, content services, and communication management capabilities. Globally, successful enterprises rely on Newgen's industry-recognized low code application platform to develop and deploy complex, content-driven, and customer-engaging business applications on the cloud. From onboarding to service requests, lending to underwriting, and for many more use cases across industries. Newgen unlocks simple with speed and agility.

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