



One of the Largest Insurance and Investment Companies Implements Newgen Omnichannel Customer Engagement (CCM) Platform

Drives growth through on-demand policy document generation

Overview

The insurer has an asset value of over 200 billion USD. It has a massive network of agents who help solicit life insurance business from the public.

The company was looking for an Omnichannel Customer Engagement (CCM) Platform to help improve customer self-service by enabling their end-customers to generate documents on-demand through digital touchpoints.

Challenges Faced by the Organization

- Delay in policy document generation causing difficulty in processing service requests
- Absence of a single communication platform to enable real-time document generation
- Lack of integration with the existing core systems, including e-portal, document management system (DMS), and channel gateways

Improved Customer Service with Newgen

The insurance company chose Newgen OmniOMS Omnichannel Customer Engagement Platform to generate communications with the required attachments when the customer demands it.

The company integrated the OmniOMS platform with the online portal to facilitate on-demand generation of policy related documents. This allowed the customers to access invoices from the portal. Furthermore, the documents were archived in the DMS to ensure quick retrieval later.

Additionally, the insurer integrated the platform with the e-mail and enabled automatic notifications, such as sign up, eService registration, complaint registration, and pending renewal.

Solution Highlights

- CCM on-demand module for invoice generation, and renewals notifications
- Deployment of OmniDocs for quick and secure document archival
- Integration with online service portal



Implementation Snapshot

100,000 invoices and renewal notifications processed daily, on-demand

Business Processes Impacted:

- New Policy Issuance
- Policy Renewal
- Loan Reimbursement

Product Impacted:

- Life Insurance

Communication Mode:

- On-demand

Output Channel:

- E-mail
- SMS

Integration With:

- Online Portal
- SMS Servers
- DMS

Templates Standardized:

E-mail:

- Policy Schedule
- Detailed Policy Status Report
- Renewal Payment Acknowledgment
- Premium Payment Receipt
- Annual Premium Certificate
- Existing Loan Status
- Revival Quotation

SMS:

- Sign Up
- eServices Registration
- Premium Payment
- Complaint Registration

Benefits of the Implementation



Easy, real-time access to documents through the e-portal, reducing load on operations



Quick adaptation to changing regulatory guidelines for communication documents



Reduced dependency on IT to create communication templates

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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