

# Leading Insurance Company Enhances Customer Service with Newgen Omnichannel Customer Engagement (CCM) Product Suite

## About the Client

The client is one of the leading insurance players in India. It offers a variety of general insurance products in retail and commercial space to make insurance easily accessible for individuals and businesses alike.

## Key Challenges Faced

- **Operational Bottleneck**
  - Delay in communication generation
- **Delayed Customer Service**
  - Manual and time-consuming process for claims correspondence
  - No updates on customer portals
- **Disjointed Systems**
  - Multiple systems resulting in low visibility across the process

## Transforming Customer Services with Newgen

To improve customer service, the client realized the need to deliver timely and effective customer communications. For this, the client chose Newgen Omnichannel Customer Engagement (CCM) product suite, OmniOMS. Using the suite, built on Newgen's low code digital automation platform, the organization can now generate personalized communications based on customers' information. The application is integrated with the client's existing online service portal, which has resulted in better visibility, easy information access, and omnichannel customer engagement.

The implementation has enabled the client to interact with its customers through their preferred channels, including SMS, e-mail, WhatsApp, and others.

---

### Highlights of the Implementation

- Streamlined creation and delivery of customer communications
- Ability to control and edit documents in real-time before sending them to the claimant
- Real-time communications with customers throughout their buying journeys. For instance, for new policy issuance - policy quotation, OTPs for verification, quote bind confirmation, payment links, issuance acknowledgment, welcome letter with new policy schedule, and reminders are configured in OmniOMS and are delivered through email, SMS, WhatsApp, etc.

---

### Benefits Achieved



Auto-generation of policy documents in PDF formats



Improved customer service with faster claims correspondence, and real-time communications on the portal



Centralized generation and tracking of communications across business processes

---

## Implementation Snapshot

### Business Processes Impacted

- Personal Accident Claims
- New Business

### Products Impacted

- Health Insurance
- Motor Insurance

### Volume

- 2 million communications/month

### Reporting Dashboards to track communications based on,

- Policy, Quote, or Claim ID
- Source Application
- Generation Date
- Template ID
- Status (Success/Failure)
- Communication Type (E-Mail/SMS/WhatsApp)
- Sent Date, Delivery Date, or Open Date

### Standardized Templates

- **For New Business:** Policy Document, Schedule, Welcome Letters, Policy Renewal Reminders, and Payment Receipts
- **For Claims:** Claim Intimations, Reminders, and Acknowledgements



## 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.

### **FOR SALES QUERY**

AMERICAS: +1 (202) 800 7783  
CANADA: +1-202-800-7783  
AUSTRALIA: +61 290 537 174  
INDIA: +91 11 40773769  
APAC: +65 3157 6189  
MEA: +973-1-619-8002, +971 44541365  
EUROPE: +44 (0) 2036 514805

[info@newgensoft.com](mailto:info@newgensoft.com)  
[www.newgensoft.com](http://www.newgensoft.com)

