



AgentPolicyCenter

(Insurance Portal)

Companies in insurance industry are facing challenge to maintain and manage the multiple old legacy policy administration systems which are inaccessible to outside users, on the end user side Agents in the agencies and policyholders struggle to get the information about the policies, billing, claims. Current multiple manual ways like email, fax, customer call centers to make requests for changes in policy, billing, claims and other information are time consuming, error prone. Insurance company back office and underwriters spend a lot of time in contacting agents for correct data, manual tracking various things like endorsement requests and legal documents. There are always chances of missing the deadlines, important details, legal documents for claims etc. which ultimately impact all the stakeholders (Agents, Underwrites, Policy Holders) in the form of customer satisfaction, efforts, time and money.

Solution Overview

The **AgentPolicyCenter** application by Persistent Systems provides an insurance portal for all the stakeholders with data from multiple legacy policy administration, billing, claims etc. systems to view, update, track all the relevant data for the policies. The Underwrites or back office personal can easily access all the endorsement information and make necessary changes in the legacy system manually, same time complete the task in Appian so Agents, Policy Holder get notifications. Use of Appian features like Tasks, Reports, Web API, Decision Objects the solution helps in easy ways to improve the efficiency, customer satisfaction and unlocks possibilities to explore automation using RPA, AIML technologies. The simulation of the chatbot AgentPolicyCenter integration helps Agents & Underwriters to take help of the knowledgebase and more relevant sources.

Key Functionality & Features

AgentPolicyCenter Insurance Portal allows Agents & Underwrites to

- View the data for policy holder from multiple legacy systems, line of businesses into a single interface instead of dealing with multiple systems
- Interact with the Chatbot to take help from the knowledgebase and various other resources.
- Submit / Review / Track endorsements, supporting documents and other quantitative information to take decisions
- Tasks, Email notifications, comments etc. as better ways of tracking and communicating with the Insurance company
- Review the information about insured for cross selling opportunities for Agents as multiple system data is accessible collectively at single place
- Integration with Address validation to provide correct data at the endorsement submission for addresses
- Easy to track the submitted requests and make amendments, corrections, upload supporting documents to help Underwriters
- Be more productive and efficient as all the required data and relevant documents are accessible within

In addition to above features **AgentPolicyCenter** can be enhanced to

- Provide an open access Web Portal to the policy holders to access the policy information, the portal would reuse the Appian by exposing We API's to get data & create tasks
- Some of the tasks like Address change in same city/locality doesn't need manual intervention and using Appian Decision Table such tasks get assigned RPA Bots group. A bot can easily access these tasks and complete the necessary legacy system updates
- Collect the data of various Chatbot interactions, type of endorsements to understand the need to Agents & policy holders to improve various systems & marketing strategies

Key Benefits

- Single interface for Agents to access the policy holder data from multiple legacy systems with ease
- Improved customer satisfaction and efficiency at Policy Holder, Agents & Underwriters end
- Easy tracking of data and interaction mechanism for all the stakeholders, reduced data errors as data validated at entry into the system
- Cost saving at the customer call center, Underwriter / back office staff as manual efforts and time is saved to track information
- Integration with Chatbot & other AIML technologies (OCR, NLP etc.) would help in long run to automate the various steps / use cases

About Persistent Systems

Persistent Systems (BSE & NSE: PERSISTENT) builds software that drives our customers' business; enterprises and software product companies with software at the core of their digital transformation. For more information, please visit: www.persistent.com | www.appian.persistent.com

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