

**PRODUCT CAPABILITY**

**SYMBIOSYS  
SALES TOOL**

SymbioSys Sales Tool is a comprehensive sales enabler for Field Sales force providing Lead-Activity Management, Collateral Management, Financial Need Analysis, Sales Illustration, & e-Application capture capabilities. Its unique differentiator is extensive configurability, remote customer collaboration and offline field underwriting capability for quick sales closure.



**HIGHLY CONFIGURABLE  
SERVICE**



**PROVEN  
EXPERIENCE**



**CLOUD READY  
ARCHITECTURE**



**PAY-AS-YOU-GO  
ENGAGEMENT**

**KEY FEATURES**



**Integrated Solution**

Diverse front end interactions and extended to different User/ Channels/POS/ Aggregators



**Technologically Agnostic**

Works on multiple platforms (Tablets/Laptops) and OS (Android/iOS/Windows)



**Field Underwriting**

Ability to underwrite case at source for quick closure



**Business Agility**

Ability to quickly launch products, adapt to business processes for partners



**Intelligent Offline Functionalities**

Offline sales engagement with seamless data sync during connectivity



**Customer Collaboration**

Ease of engaging with customer remotely to conclude sale

**Improved Sales Effectiveness**

## BUSINESS CHALLENGES

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**Multiple interactions with customers**  
leading to long time for sales closure



**Inconsistent sales process**  
leading to high manual work



**Higher time and cost**  
for Agent learning



High application  
**NIGO rate**



Inability to meet  
**evolving business and distribution** demands



**High turnaround time** for policy  
issuance due to fragmented  
sales process

## BUSINESS DRIVERS

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**Increased face time**  
with customer



**Quick Sales closure**  
with proper controls



**Improved distributor productivity**



**Consultative selling** to  
improve customer  
experience



**Availability across platforms** to promote  
**BYOD concept**



**Reduced time** to  
launch new products



**Quick adaptation** to  
evolving business needs

## DIFFERENTIATORS

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**Extensive Configurability,**  
widest range of configurators



**Unified Solution for Diverse OS,**  
Single Coding for iOS, Android,  
Windows



**Maximum Offline Capability,**  
Unique rule capability that  
works even in offline

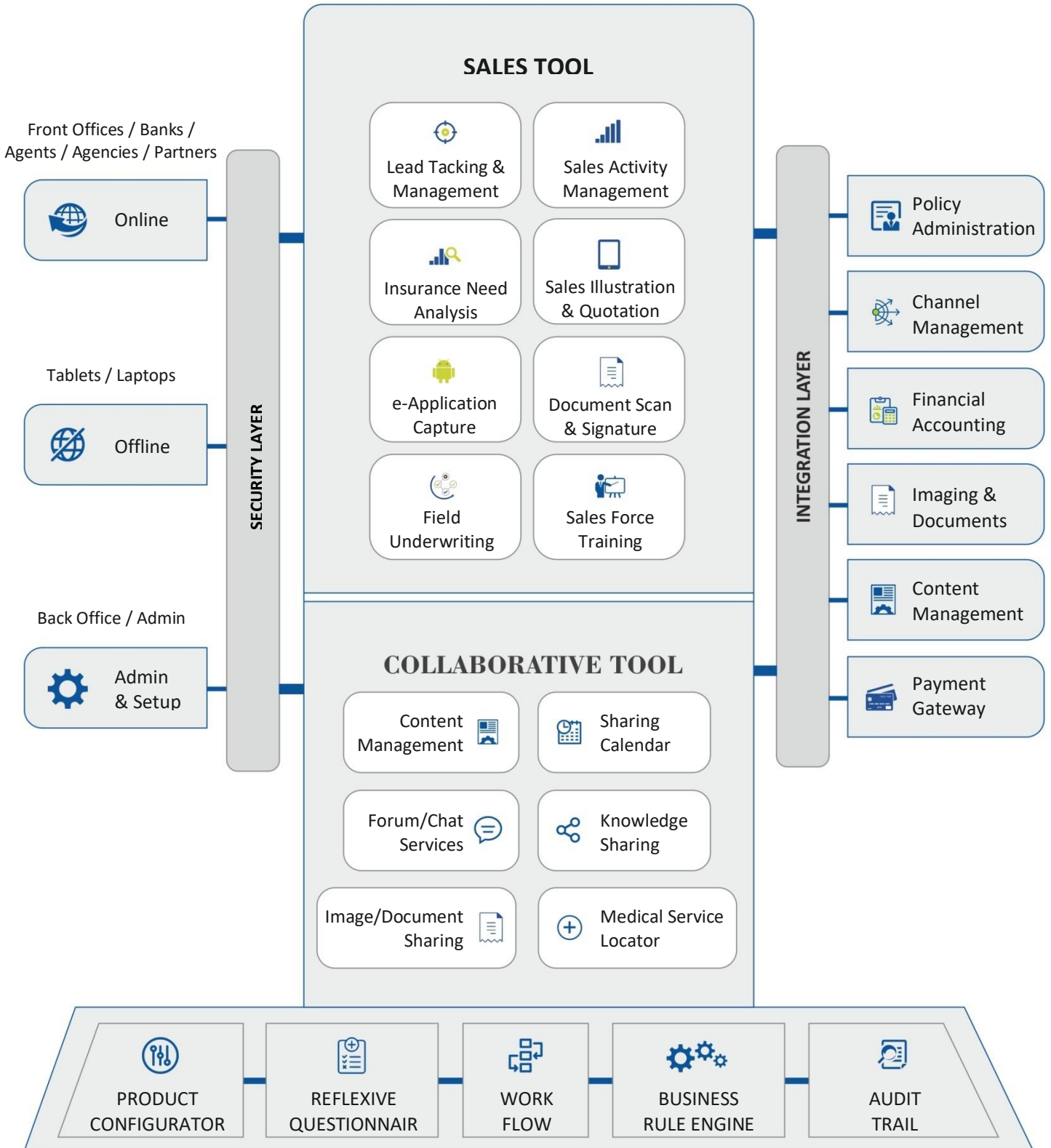


**Security,** remote wipe  
for better security



**Customer Engagement,**  
Tools to map life events for  
informed decision making

## SYMBIOSYS SALES TOOL - SYSTEM OVERVIEW



## SERVICE BENEFITS

### CREATE



Process rules that map to existing business process



Reflexive questionnaire to capture context sensitive data



Product rules that align and complement Core

### REDUCE



Cost of New Business Acquisition by 20% - 60%



Sales force training cost by at least 50%



Turnaround time for Policy issuance from days to hours

### IMPROVE



STP rate by 20%-100%



Customer experience & Sales conversion



Operational efficiency & Sales productivity

## QUICK FACTS



**500+**  
Products  
Implemented



**24**  
Sites



**500,000+**  
Agents/Partners



**SHORT**  
Time to make agent  
productive



**>50%**  
Improvement in  
STP rate



**100%**  
Reduction in  
NIGO cases

