



DIGITALL INSURANCE 365

The Insurance Customer Experience Framework



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CUSTOMER CENTRICITY FOR INSURERS

INSURED WITH DIGITALL & MICROSOFT DYNAMICS 365

DIGITALL INSURANCE 365 is the industry solution based on Microsoft Dynamics 365 and Power Platform applications for centralized overview and consulting of Insurance customers and partners!

Automate your insurance management with the most important ready-made processes including self-service options.

Manage customer and partner information, automate key processes across the entire customer lifecycle, and get the tools you need for acquisition and cold calls. Create and edit customer appointments and opportunities, and view policy, claims and inquiry data.

The added values of this include

- Satisfied customers & employees
- Save costs & time
- Work more efficiently and transparently

What is DIGITALL INSURANCE 365?

A CRM solution based on MS Dynamics 365 and the Power Platform applications specifically for the insurance industry.

Our accelerator for your project

Our accelerator gives you the individual opportunity to accelerate your joint project with us and save time and development effort, especially at the beginning.

With this approach, the focus of the development is guaranteed to be on processes and objects specifically tailored to your needs.



DYNAMICS 365 - SALES

Give your sales team the best tools and data with Insurance 365 to identify and quality potential customers. Choose the best possible next steps, develop segments smartly, and document customer history seamlessly

ACCOUNT SETTING

Subdivision of the customer view into a clear structure with a corresponding overview:

- Private customers/Contact
- Corporate customers/Account
- Household view and illustration of the business networks
- Partner/Account (agency, broker, insurer, service provider)

Segmentation of customer into:

- Qualified (Contacts and/or Accounts)
- Interested parties (contacts and/or accounts)
- Current policyholders (contacts and/or accounts)
- Former policyholders (contacts and/or accounts)

Corresponding contacts can be recorded for corporate customer and partners.

(CONSULTATION) MEETING

Whether it's a consultation or a claims meeting, direct customer contact on-site or remote offers the best opportunity to interact with customers and sell insurance products. Offer customers and prospects a simple way to set up a meeting on-site or as an online meeting with self-service options and predefined time windows for the respective request. All meetings are transferred directly to your calendar. Internal service staff or agencies can also work with pre-selected contacts.

For an agreed meeting the user is guided through both the preparation and the appointment itself. In this way no important points and information are forgotten. The customer thus receives the individual support he or she deserves. In the follow-up, the relevant information can be sent to the customer automatically and follow-up activities can be recorded in the CRM. In this way, you never miss an opportunity to do business while providing the highest possible level of service to the customer.



CONSULTATION MEETING NOTE

It makes no difference whether it is an initial consultation, an annual meeting or a claims intake, simply create a consultation protocol or meeting note from the information already prepared and recorded in a structured way from the consultation/client meeting.

The creation is based on predefined templates (pre- and post- processing).

LEAD POTENTIAL

The pre-structured potential (lead) qualification process ensures sales potential. It will be continuously enriched with information using predefined actions - provided by your employees.

The conversion-rate is analysed according to the new insurance policies (using a defined index).

SALES OPPORTUNITIES

Collect structured and concrete inquiries about specific segments from customers and business partners. Information on next steps helps to achieve the greatest possible success and maximize the number of deals.

Additional, outcomes of the sales opportunity can be recorded to gain insights for future inquiries.

PROFITABILITY

Profitability is an important indicator in the insurance industry, showing, for example, whether a customer relationship or portfolio is profitable from the insurer's point of view. In this context, premium income is offset by claims payments.

With our solution, these profitability figures can be viewed at different levels and for different objects (e.g., customers, contracts, broker portfolios), so that appropriate portfolio management measures can be taken at an early stage.



CUSTOMER PORTAL – SELF-SERVICE (24/7 WITH CHATBOTS)

With self-service and automation, customers can answer their own questions quickly and easily. Integrated, powerful chatbots automatically resolve repetitive tasks and simple support cases in direct communication with your customers. Handover to an agent for specialized handling is also possible

POLICY AND CLAIMS VIEW

With the display of policies and claims, we round off the 360° view of the customer, giving insurance companies, agencies, brokers and customers a complete overview of the portfolio, the policies concluded and claims.

The system is used as a front-end option for recording claims in order to pass on the relevant information to a claims processing system.

Through the structured display in CRM, sales follow-up activities from both objects can be recorded and processed to increase efficiency, effectiveness and success.



DYNAMICS 365 - MARKETING

Provide the right marketing templates and tools to engage your leads and customers through personalized and relevant activities. Make your marketing team's job easier with standardized templates that bring your brand into focus and provide freedom for creative campaigns.

Manage customer and partner information

Automate key processes across the entire customer lifecycle, and get the tools you need for acquisition and cold calls. Create and edit customer events and opportunities, and view policy, claims and inquiry data.

- Satisfied customers & employees
- Save costs & time
- Work more efficiently and transparently

DYNAMICS 365 – CUSTOMER SERVICE

In addition to insurance sales, reliable claims settlement and modern marketing, back-office customer service is another very important pillar in customer care.

With DIGITALL INSURANCE 365, we are bringing solutions based on MS Dynamics and the MS Power Platform applications here as well, so that customers can be serviced quickly, reliably and in a targeted manner.

The customer service module contain the following central elements:

- Structured collection and management of customer concerns from different input channels.
- Distribution of concerns based on the skills of the staff members
- Fair distribution of work
- Prioritisation of important concerns
- Deposit and measurement of service level agreements
- Possibility to record time spent on issues
- Enable staff to deal with every issue as competently and reliably as possible



CONTACT OUR TEAM OF INSURANCE EXPERTS



FLORIAN KIENE

VP FUNCTIONAL
CONSULTING



Mario Pufahl

CHIEF SALES OFFICER



FLORIAN DIMMIG

SALES MANAGER



ABOUT DIGITALL

We are DIGITALL – a digital leader born from two technology and business driven consulting companies with more than 20 years of success and experiences on the global market. By joining forces, we deliver the next generation Digital Transformation & Digital Cloud Experience to enterprises.

We digitalize and protect customers, employees and data. Our customers rely on us to transform their core business processes in a secure way in the digital world.

And we achieve this by leveraging best-in-class partner technologies and own innovative solutions, implemented by experienced teams. In this way, we empower our customers to be among the leaders in their industry and scale globally.