

## Case Study

### UniServe™ NXT | CCM

# End-to-end process automation and cost optimization with Customer Communications Management solution

Leading insurance company which is a joint venture between India's leading private telecom company and world leader in providing financial protection and wealth management to millions of families all over the world. The insurance company has established itself as a front-runner in one of the largest insurance markets in the world.

Intense's Customer Communications Management solution built on UniServe™ NXT Platform has been seamlessly dovetailed with Core Insurance application, RLS, for efficient processing of statements.



### Enterprise Agility Challenges

#### Tedious and time consuming change management due to system rigidity

- Host server in Hong Kong; no access from India to make changes
- Business could not readily respond and reflect the changes, whether from market or the regulator
- Policy documents could not be personalized to meet individual (customer/advisor) needs

#### Welcome kit is a combination of diverse documents that are collated manually

- Manual intervention leading to collation errors
- Since the process was not automated, no reconciliation and error detection facility

#### Automation of policy document generation not possible

- Automating the process was difficult as it involved multiple report types

#### Print was the only output medium available

- Customers/advisors seeking electronic delivery of statements could not be served
- As prints had to be initiated from the system in Hong Kong, duplicate statement requests could not be addressed immediately

Customer Communications Management solution helped in offering customers a more personalized experience. The solution will also improve operational efficiency through intelligent printing and delivery options.

## Benefits from our Customer Communications Management solution

### Building brand intimacy

- Presentation of branded welcome kit, fund transaction notice, monthly/annual unit statements, agent commission statements, etc., to customers and agents
- Dynamic insertion of personalized honorifics and greetings on special occasions like anniversaries, birthdays, festivals, etc.
- Shorter response time to customer queries made possible by a centralized database
- Faster and efficient services due to automated and multimodal delivery - Print/email, etc

### Self-dependency

- Ability to create templates and generate documents to meet local requirements and business needs
- Change management with faster turnaround times
- Ability to send electronic statements through password-protected email attachments

### Automated policy document generation

- Automated process for generation of welcome kit
- Generation of error-free documents
- Faster generation of customer documents since manual intervention was completely eliminated
- Dynamically extracting information and presenting as rich statements

### Cost and time savings

- No vendor dependency resulted in savings print costs
- Cost savings due to 20% of the customers/advisors receiving statements through email
- Reduced time in reprinting of duplicate statements (on request) identical to originals
- Automated processes reduced delivery times

### Improved customer service

- Faster delivery of duplicate statements
- Faster response to customer queries



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