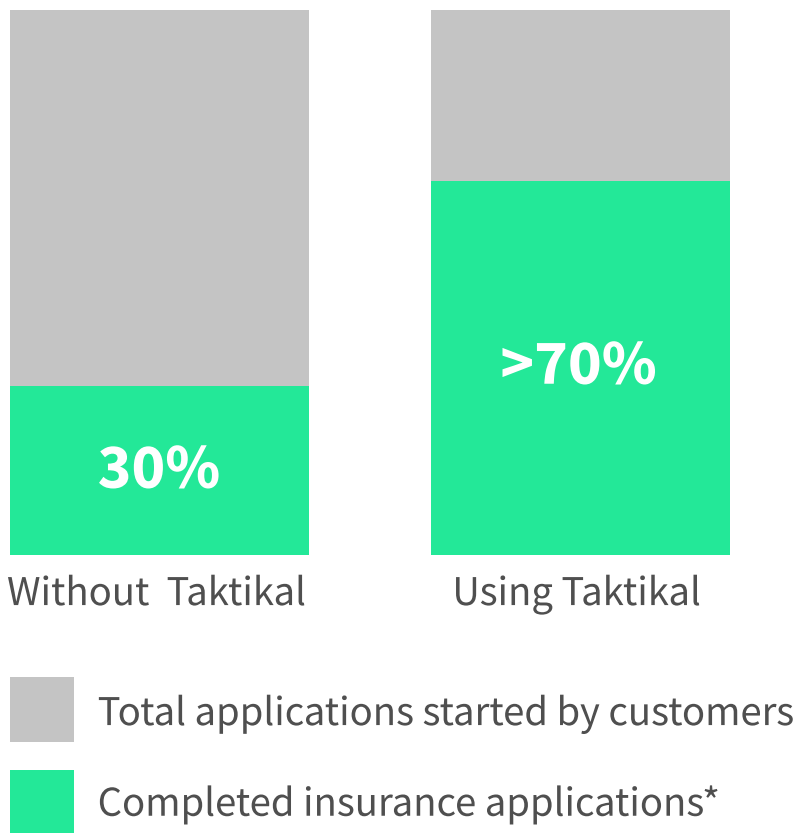




Optimize sales processes, exceed customer expectations

Completed insurance applications



*Average completion rate of insurance forms in 2021

Document processing for customer onboarding, policy changes, and cancellation is a well-known barrier to a streamlined and positive experience for both employees and customers. Forms and signatures are a central part of this system and often require the costly transport and exchange of multi-page documents. Manual processes not only hinder company efficiency and impact sales, they are also more susceptible to error and even loss.

Taktikal solutions aim to speed up these processes, increase security, and improve the customer experience by providing a simple way to digitize workflows, making them accessible and simple for agents, brokers, and policyholders alike.

2 days to
3 minutes

Average time to complete forms processing
- Vörður Insurance

2 FTEs

Labor saved since implementation
- TM Insurance

25 000+
signatures

Average number collected online monthly
- Vörður Insurance

2 months
to 5 days

Time it took to set up a seamless integration
- Sjóvá Insurance

253 000+
trips

Current number of car trips prevented as of April 2022
- Taktikal total

72

Number of policy forms already digitalized
- TM Insurance

SJÓVÁ

“The implementation process for Taktikal Fill & Sign took only 1-2 days. For our customers, these changes mean better service and faster processing, as well as an updated electronic process that significantly facilitates the work of employees. Our goal is first and foremost to provide excellent service and good advice, and Taktikal's solutions fit well with that goal.”

-Fannar Ásgrímsson, Senior Service Designer at Sjóvá Insurance

Key Benefits for Insurance

Expedite sales processes

A quick set up makes it simple to start managing new policyholder sales online. Complete forms, collect signatures, and verify identity all from a designated portal.

Reduce costs and labor

Cut time and costs related to analogue document processing methods. Significantly reduce the number of hours and amount of paper needed for workflows.

Digitize workflows and records

Keep track of policy applications and claims and automatically forward them to a company database through a simple integration. Easily monitor document status and audit trails in a company portal.

Stay compliant and secure

Built-in authentication systems ensure that customer identities are confirmed and signatures saved securely to tamper-proof electronic documents.

Pursue a green initiative

Go beyond improving operational efficiency and reducing costs with digitized workflows. Significantly minimize the environmental impact of traditionally paper-reliant systems.

The Taktikal Approach to Digital Insurance Workflows

A positive customer experience is at the core of any successful business. More and more, customers are expecting a certain level of security and efficiency. Companies offering traditionally paper-based processes such as insurance policy applications have realized the need for digitized options. Solutions today allow improvement of a process that not only enhances the customer experience but also positively impacts employees, company costs and the environment.

Taktikal provides different levels of customization aimed at making it easy to implement a time-saving and compliant solution and start realizing the benefits of digitized workflows.

Taktikal solutions improve your workflows

- New policy sales
- Insurance claims
- Cancellations and premiums changes
- Audit and compliance documentation
- Policy management

Electronic signatures

Confirm customer identity with digital signature options for every online form and onboarding process and reduce risk of incomplete processes. Track document activity and follow up with reminders.

Simple online forms

Convert PDFs or build online forms for policy or claims applications in minutes. Clean, fillable fields are provided when the customer begins the application process.

White label options

Implement the online forms and signature solutions into a portal complete with custom company branding and logo to provide a seamless, trustworthy experience for customers.

Fast API integration

Straightforward Rest APIs give developers the resources to establish a connection between the solution and the company system. Assistance with custom connections is available.

Identity authentication

ID verification is required for each customer accessing a form or digitally signing a document and is submitted securely within the designated company portal.