



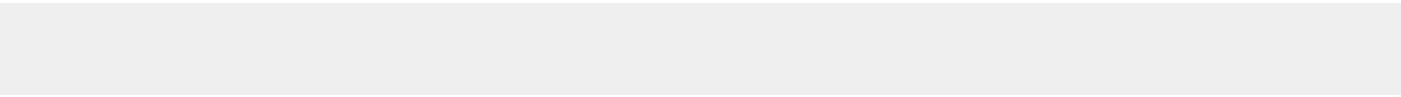
DOCOMOTION

A Novidea Company



HOW INSURANCE COMPANIES CAN **EASILY** BOOST AGENTS' SALES

A Case study

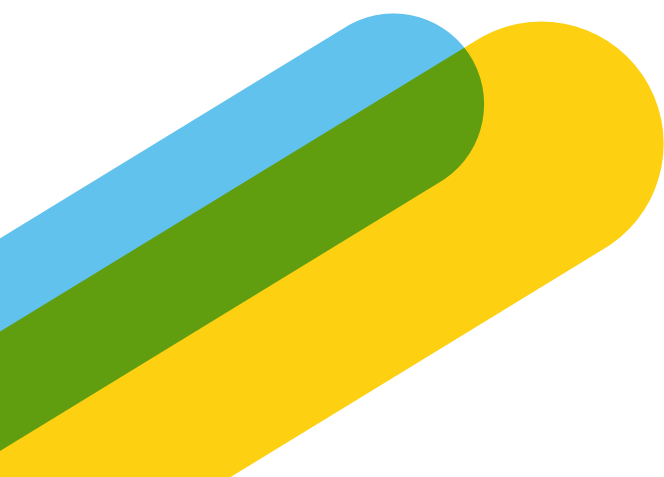


Since implementing Docomotion, a global insurance company has been able to streamline its document-related processes and increase the efficacy of its personnel. As a result, this insurance business has drastically improved its operations and gained a competitive advantage beyond expectations.

Background:

Every insurance company faced challenges in generating policies and other documents for its clients. Insurance companies have hundreds of templates to manage. Agents spent a significant amount of time setting up and manually creating policies, embedding them with the correct terms and clauses, and issuing personalized policies that reflect the needs of each client's specific requirements.

This resulted in a heavy burden on insurance brokers and a skewed balance of their time towards administrative work rather than making actual sales. The company recognized that it needed to find a way to quickly issue error-free customer responses or risk losing business to its competitors.



The Opportunity:

The company recognized document generation as a major bottleneck in its business processes and began to look for a solution that would reduce the administrative burden on its staff, freeing up agents to focus on sales and providing better service to clients. The ideal solution would have to be fully integrated with its core system and be capable of generating pixel-perfect complicated documents, that would include using business logic to dynamically insert paragraphs into templates.

The Solution:

Docomotion, a leading document generation solution for Salesforce that enabled them to consolidate document templates, automate the generation of documents across end-to-end processes, and easily apply wording and clauses libraries to ensure tailoring to specific needs of policyholders.

With this solution, the company streamlined its document creation process. By consolidating templates, they ensured that each document is consistent and accurate. Automating the generation of documents across end-to-end processes reduced manual workloads and improved overall efficiency. These improvements allowed the company to focus on its core business activities and provide better service for its customers.



The Results:

Docomotion has exceeded the client's expectations by delivering value that goes beyond just increasing efficiency and shortening sales cycles – Docomotion makes their life much easier and improves their day-to-day work:

- Complicated documents are now generated with a click of a button.
- A short list of templates, instead of the dozens they had before, reduces room for errors.
- Sales-Operation that is self-reliant, thanks to an intuitive and

Overall, the Docomotion solution has significantly benefited the client, enabling them to focus on providing better service to their customers and gaining a competitive advantage in the insurance industry.



Business Logic



External Data



Automation



eSignature



Interactive Forms



Docomotion is a company that really understands the pain points of the insurance industry, offering a document generation solution that makes our job much easier. Complicated document requirements have become simple to achieve, thanks to Docomotion. In some areas we've managed to reduce the number of templates from over 50 to a few, which has been a real game changer!" Raj Sakaria, Director of Enterprise Architecture and Apps, Howden Group

PAIN RELIEVERS



DOCOMOTION
A Novidea Company



Slow turnaround times: You need to get back to clients with a quote quickly, otherwise there's a chance they would go to another agent.

- The document generation process has been shortened, thanks to Docomotion's pre-defined templates and automatic document generation.
- Interactive approval process, enabled by Docomotion's e-Sign feature, enable clients to approve policies interactively.

Sales efficiency: You need to achieve a better balance between administrative and operational work.

- Reduced complexity in drafting policies makes it quicker and easier to generate and manage documents.
- With the new streamlined document generation process, Howden has reduced its administrative workload, enabling agents to successfully

Errors in policies: To be seen as reliable, you can't afford mistakes in the policies it issues.

- Personalized document/email generation through Docomotion enables Howden to automatically generate accurate, personalized documents and emails for each client.
- With automated clauses automatically embedded into policies, the risk of mistakes is reduced and reliability is improved.

GAIN CREATORS



DOCOMOTION
A Novidea Company



Achieve A Competitive Advantage

- Increase productivity - Each agent can handle more insurers
- Improve agency reliability with error-free outcomes

Digitalizing Processes

- Populate documents with data from CRM
- Generate documents in different formats and channels.
- Automated flows
- Collect data with interactive forms
- Using pre-built templates, including logic containers.

Quick Response Time

- Less paperwork
- Less administrative tasks:

Flexibility and Client Appeal

- For added flexibility and client appeal, Docomotion enables Howden to use different channels and document formats, based on client preferences.