**Research Health Insurance Application:**

Article: <https://whatfix.com/blog/insurance-client-onboarding>

1. Use digital applications and tools to manage the onboarding process digital applications and tools to manage the onboarding process
2. Provide clarity on their new insurance coverage and plan
3. Create a personalized experience
4. Provide documentation and tutorials on any client self-service online portals
5. Have an omnichannel communication strategy
6. Show your policyholders you understand their concerns and needs
7. Reach out on a consistent, regular basis

Article: <https://blog.agencyzoom.com/the-ultimate-3-step-onboarding-process-for-insurance-clients>

1. Day 1: Welcome Packet
2. Day 14: The “Welcome Call”
3. Last step: the pre-renewal call

Article: <https://www.doxee.com/blog/customer-experience/easy-onboarding-process-insurance/>

1. the first stages of the buyer’s journey are crucial
2. 21% of insured persons have changed insurance providers in the last two years, especially in the automotive sector. The most important point to note here: just over half of them made this decision when it was time to renew their policy.
3. focus on onboarding actions to strengthen the relationship with current customers, holding them by the hand in both the initial phase and during all subsequent phases of the relationship.
4. manage customer experience while also maintaining security and compliance
5. an easy onboarding process must facilitate the insured’s experience in fully understanding (in a way that is intuitive) the content of the policy.
6. digital channels (email, website, social media) which make it easier and faster for customers to read and understand policy, and minimizes the risk of customer churn.

Article: <https://www.amsive.com/2022/09/26/digital-is-reshaping-the-customer-onboarding-process-in-insurance/>

1. Target to communicate
2. Think omnichannel
3. Push products, services, and people
4. Future cross sell