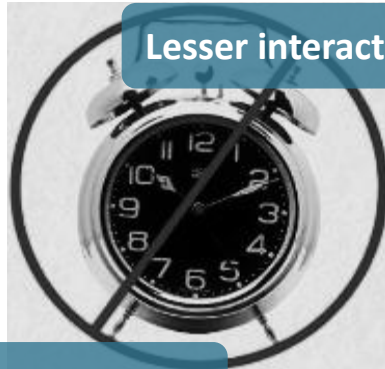




# What's happening with traditional detailing?



Lesser interaction time



Risk of inaction

Desperate pitching

Monologues

Poor feedback mechanism



Poor engagement mechanism

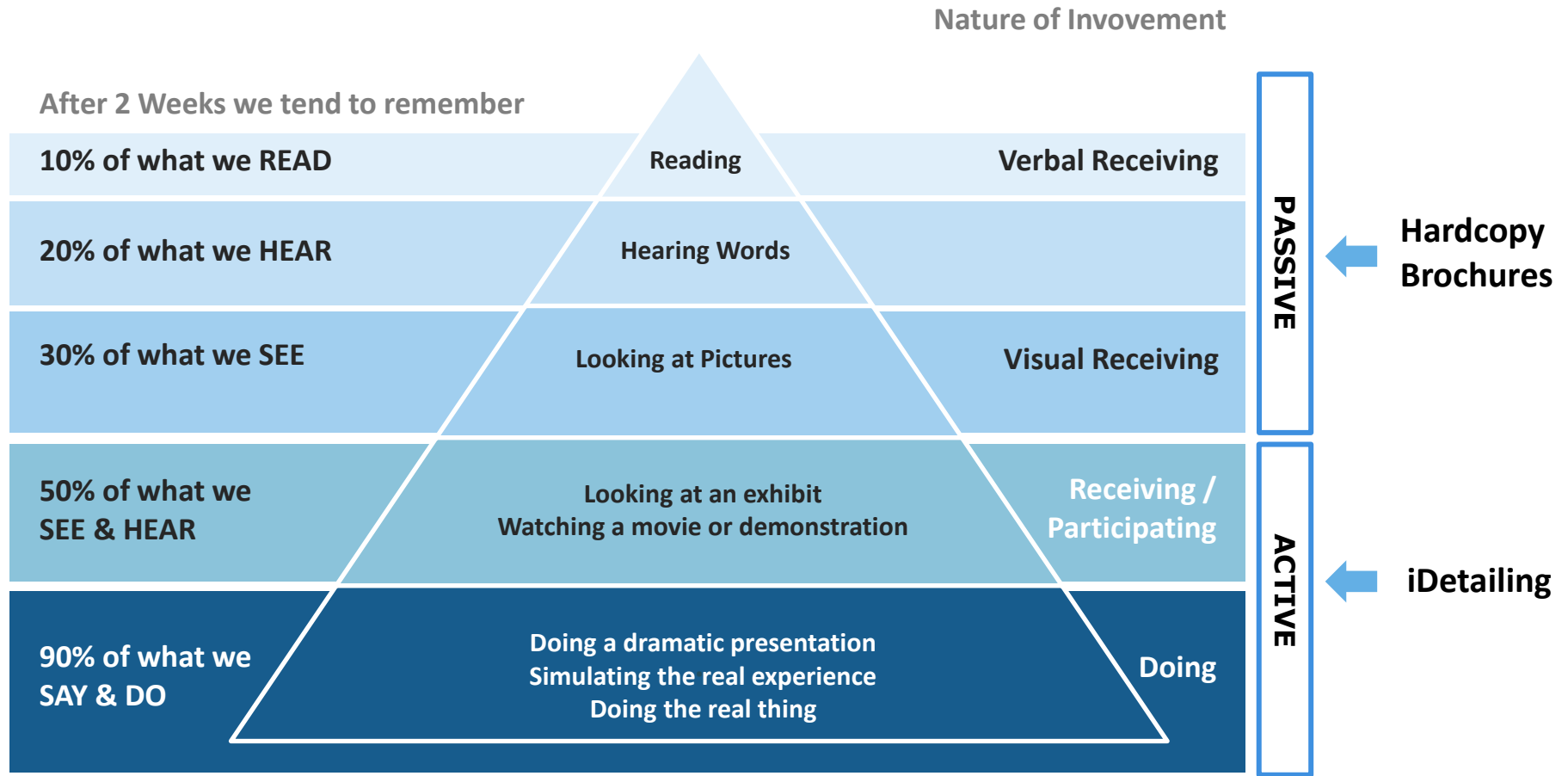


Complex information conveyance issues



Single message for all customers

# The Science behind iDetailing



Source: Edgar Dale's learning cone



- 📱 Increase sales effectiveness with visually engaging Digital Assets.
- 📱 Let your customer take charge of the tablet and the detailing suite.
- 📱 Enhance Customer interaction with the Sales Rep to increasing sales conversion

## iPitch

*iPitch is a simple and flexible sales and marketing tool that delivers a best in class user experience. It helps the sales force leverage technology to engage customers effectively. It can work with disparate sources of data such as enterprise data, customer information and content repositories to provide a unified and powerful mobile platform for the sales force.*



### ONE-STOP SALES APPLICATION

Sales force dashboard that cuts through multiple systems and assists in a more effective and efficient day on the road



### 360° CUSTOMER VIEW

Seamless aggregation of customer info from multiple sources including CRM, lead management and social media feeds



### ANALYTICS

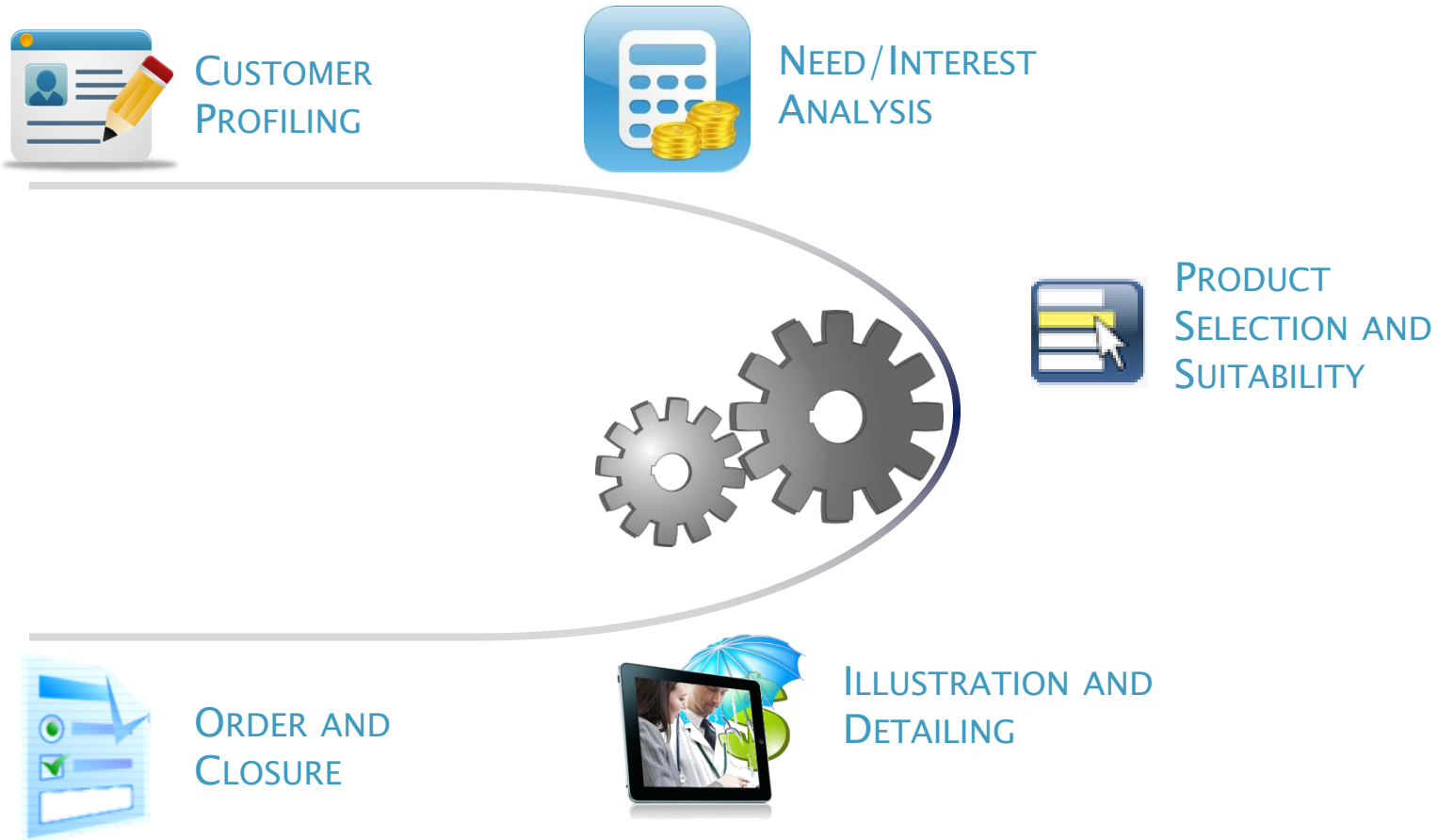
Constantly track app adoption, collateral usage and navigation flows to generate dynamic insights on messaging conveyed and customer uptake



### FNA AND ILLUSTRATION

Comprehensive illustration and FNA interface with calculators and data capture to be ready for a quick pitch

# What iPitch does



# Empower Sales Force



iPITCH



## ONE-STOP SALES FORCE TOOL

- Lead management
- Product illustration/detailing and Financial need analysis
- Incentives/rewards track
- Transactional and social alerts
- Video Chat with SME



## ANALYTICS

- Track app usage, Navigation and adoption
- Collect collateral usage data to generate insights.
- Garner insights on messaging, and effectiveness



## PROCESS EFFICIENCY, COMPLIANCE

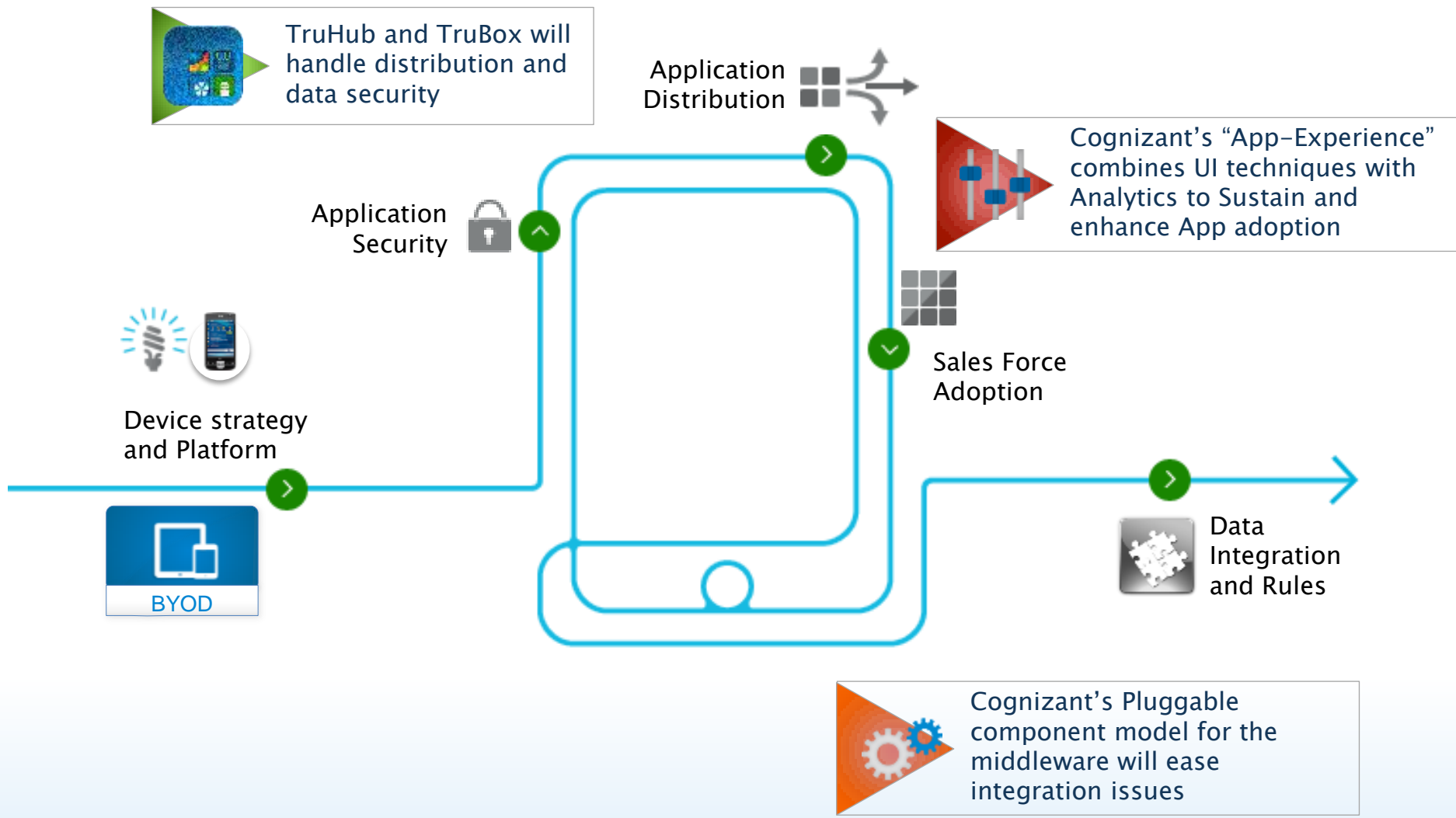
- Standardized process for Detailing and customer data collection
- Simpler and more accurate aggregation of agent and customer analytics



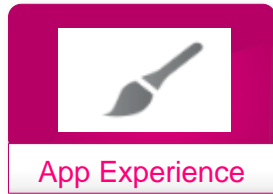
## CONSISTENCY, BRANDING & BOTTOM-LINE

- Single platform for all sales force mobility efforts
- Responsive outreach to customers with FNA, Illustration, & Alerts
- Adaptable application (to changing requirements and regulations)

# Potential Adoption challenges



# Ensuring Sales Force Adoption



ENGAGE  
USERS

INTUITIVE  
INTERFACE

BUSINESS  
VALUE

USER PERSONA'S & PROCESS  
JOURNEY MAPS

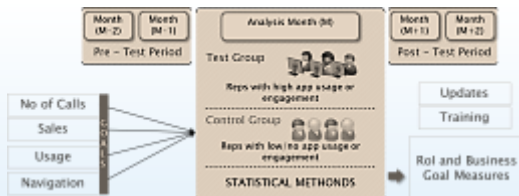
IDEATE INTERACTION  
EXPERIENCE

BUILD "INTERACTION TRUE"  
PROTOTYPES AND APP

TRACK APP USAGE ANALYTICS TO  
UNDERSTAND ADOPTION  
CHALLENGES

TRAINING &  
CORRECTIVE ACTION

MEASURE USAGE  
VALIDATE ROI





# Sales Force "Day in the Life" drives iPitch



## PLAN

- Generate leads from campaigns
- Assign leads to sales force
- Assure server data on customers and leads such as policy alerts, birthdays, claim notifications
- Manage sales reward schemes

Reduces Need to Travel to the Office

Enhanced Pre-Call Readiness



## PREPARE

- View/Modify appointments
- Day wise and customer wise management of activities with leads and accounts
- Real-time access to lead/customer data and alerts
- Stronger "Asking for the business" pitch owing to 360 degree insights

More effective & impactful calls



## SELL

- Detail product collateral
- Walk customer through step-by-step needs analysis and policy illustration
- Instant, transparent and personalized policy insights to customer

Tasks can be Performed on the Field



## OPTIMIZE

- Collate appointment and engagement analytics to study trends
- Strengthen backend data points and visual appeal of collateral

Real-time, richer insight<->sales loop from field



## TRANSACTION

- Instantly process e-enrollment to sign up the customer at real-time
- Follow up on pending premium payments
- Contact customers for up-selling and cross-selling opportunities

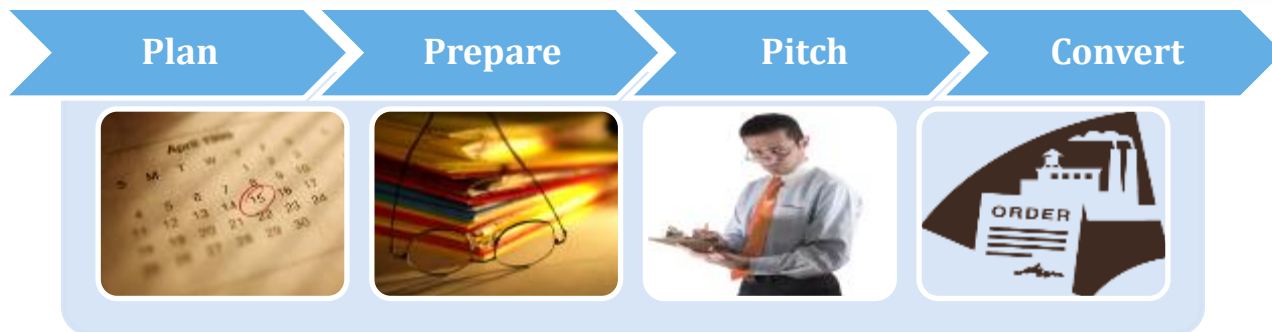
Enables anytime access to core tasks

Home Office Efficiencies

Sales Force Effectiveness



# iDetailing Use cases



## Pre-meeting Preparation



Sales Rep



Rep plans his calendar



Create custom flows & Presentations from the selected products



Custom presentation ready for the client meeting



Sales rep details the product to the customer

## Annotation



Sales Pitch



Rep wants to point to an important detail



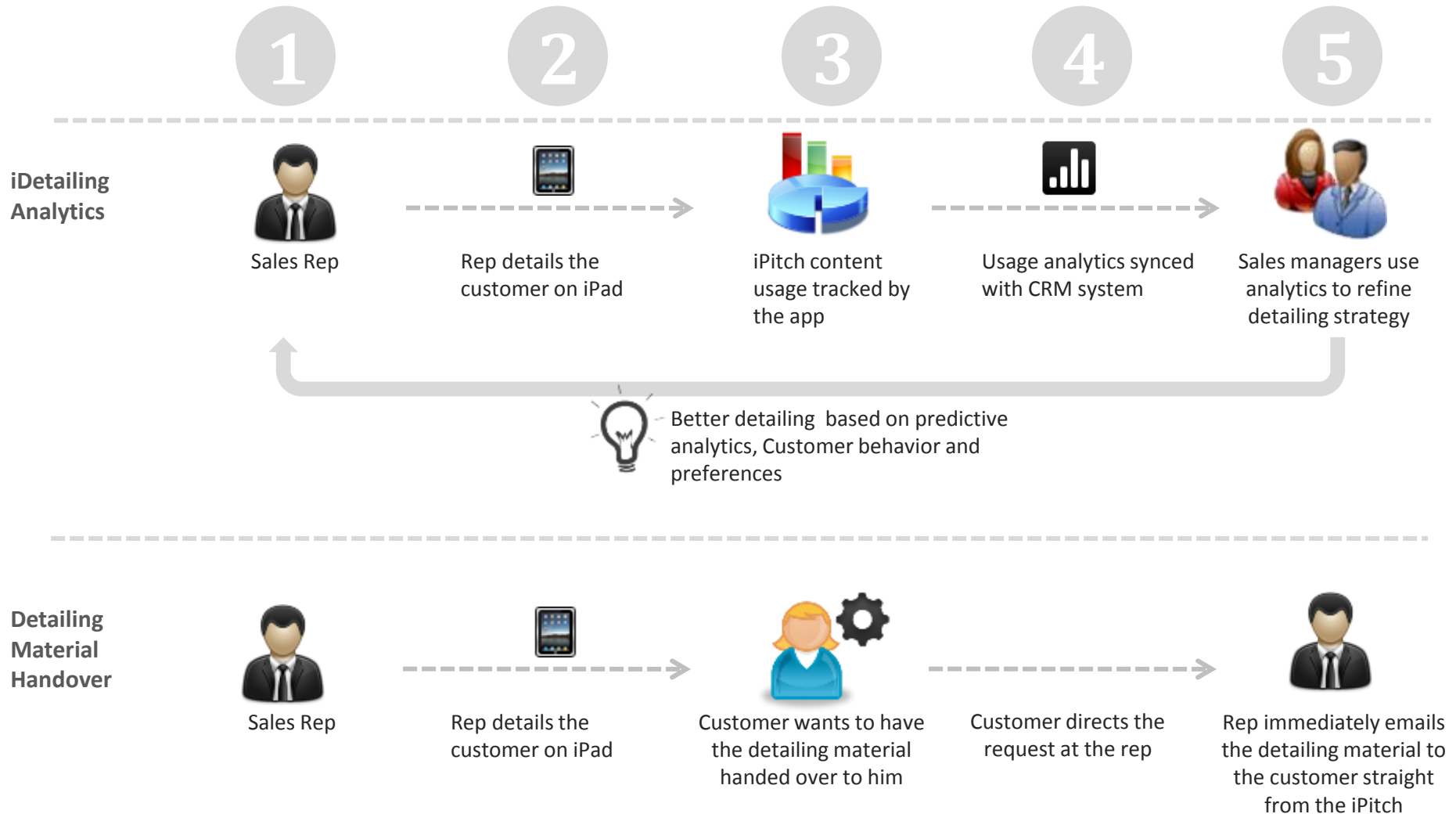
The Rep marks the content on the screen making touch gestures

Rep grabs the attention of the customer

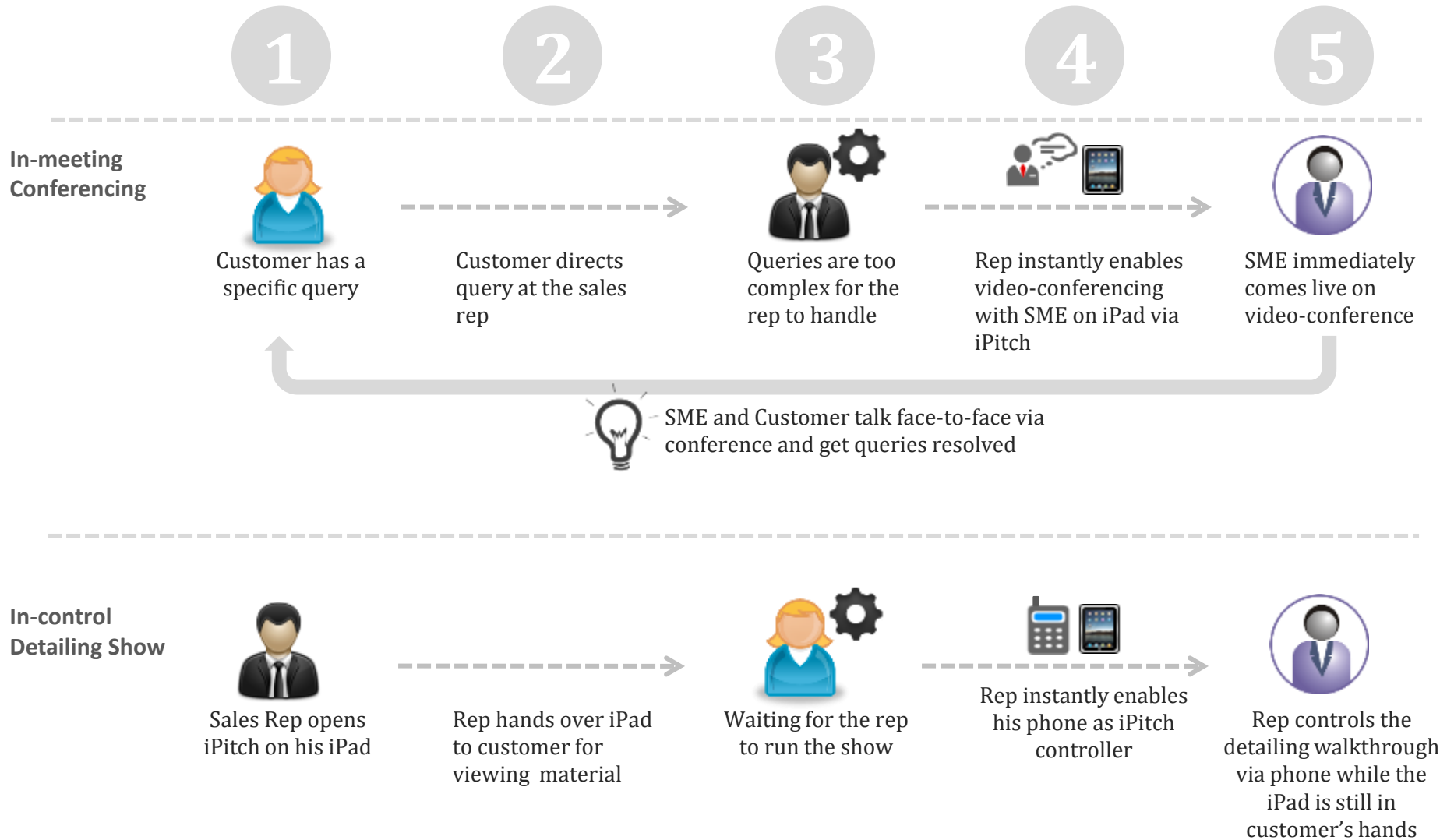


Customer impressed and wants to know more details

# Transformational iDetailing Use cases in the roadmap



# Transformational iDetailing Use cases in the roadmap



# Thank You