

FWD Protection Score

Jul 2023

C2 - Internal



The Problem

Why do customers struggle with insurance?



Limited knowledge

Lack of knowledge on protection required
and products available



Tedious process

Lengthy forms/questionnaire to fill



Lack of trust

Do not know how to navigate through
online channels

Our Solution



A better customer experience with **FWD Protection Score**

- ✓ Improve customers' financial literacy
- ✓ Short but comprehensive questionnaire
- ✓ User-friendly and intuitive
- ✓ Powered by FWD's AI engine
- ✓ Omni-channel
- ✓ Upsell and cross-sell capabilities
- ✓ Leads generation

Our Solution

How does it work?



01

Collect Customer's Responses

Compile and analyse customer's responses



02

Find People Like You

Scan the entire customer database to identify similar people



03

Provide Results Summary

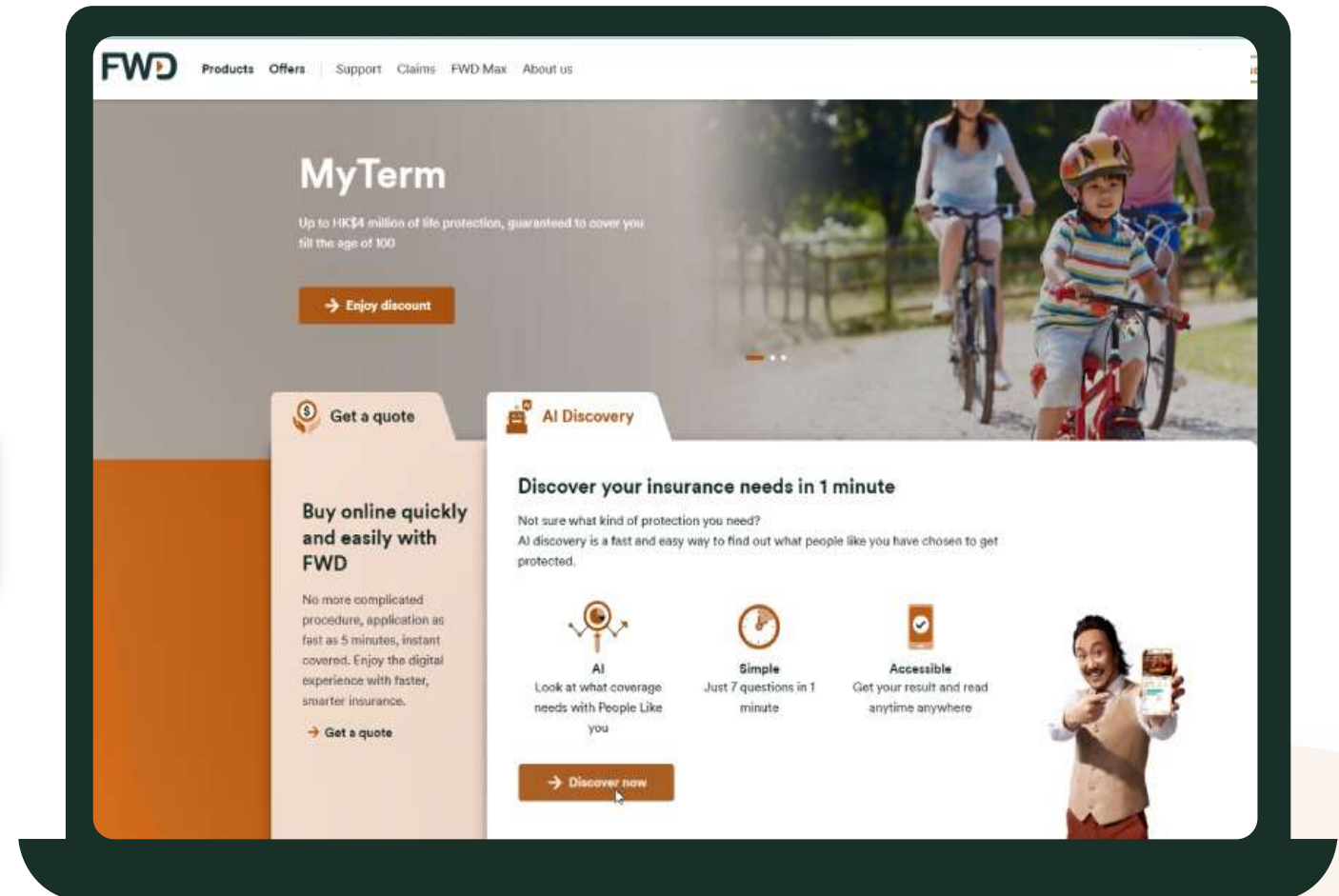
Provide customer's scoring and gap analysis report within 1 minute



04

Make Recommendations

Recommend appropriate products and coverage



Our Solution



How to find people like you?

Artificial Intelligence

Learning

Unsupervised Learning

Clustering

We group similar objects
into the same cluster and
less similar objects into
different clusters.

7

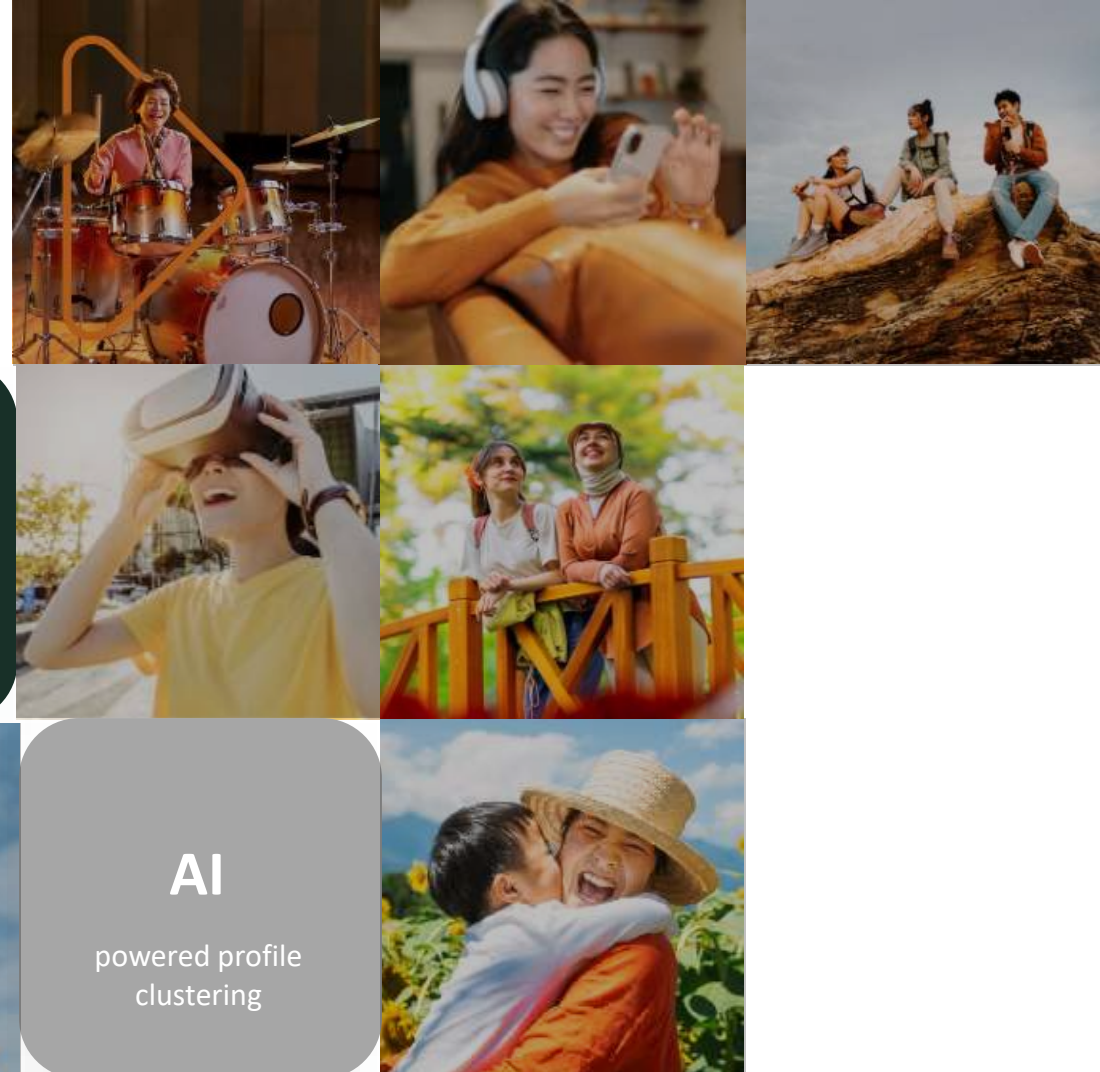
Questions

AI

powered profile
clustering

>130k

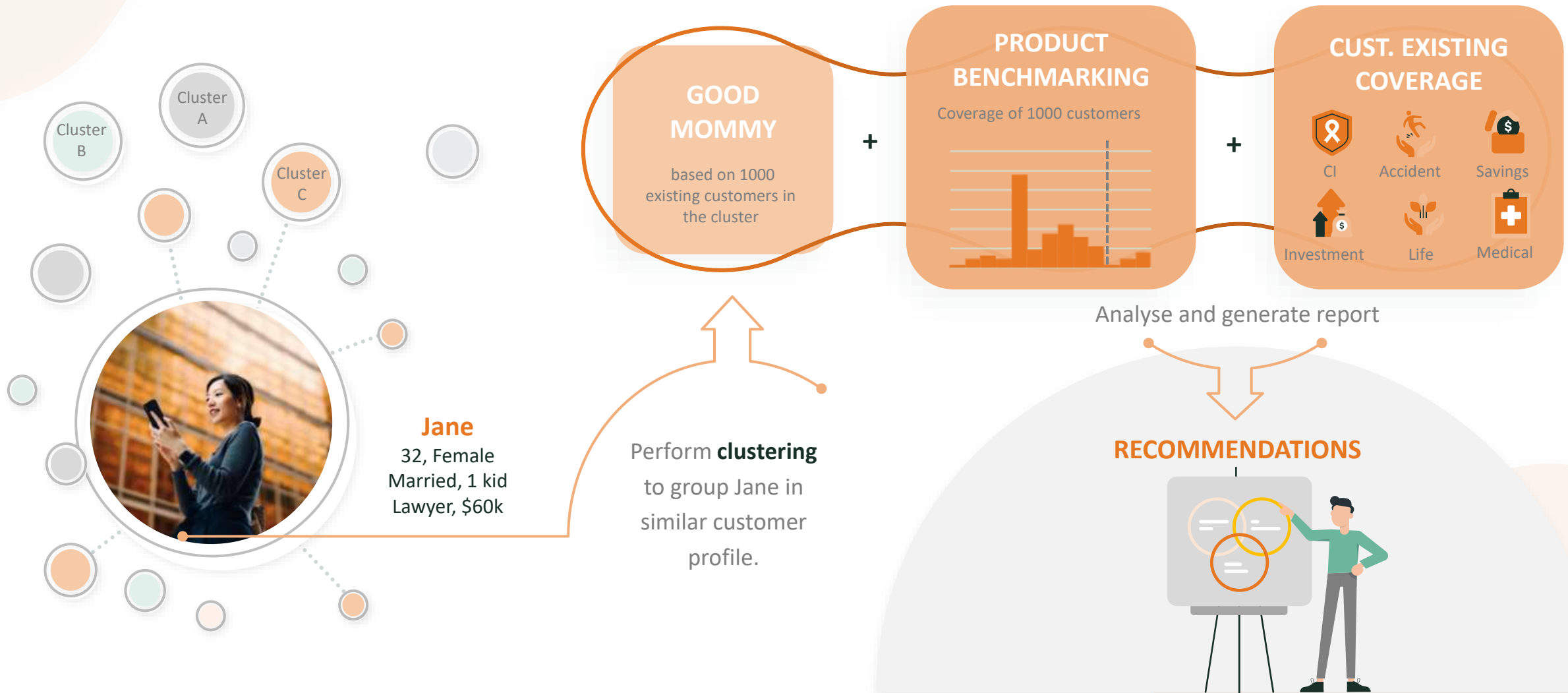
customers profiled in
HK



Our Solution



How to recommend products to a customer?



Our Solution

How does it work?



01

Collect Customer's Responses
Compile and analyse customer's responses



02

Search Similar Individual
Scan the entire customer database to identify similar people



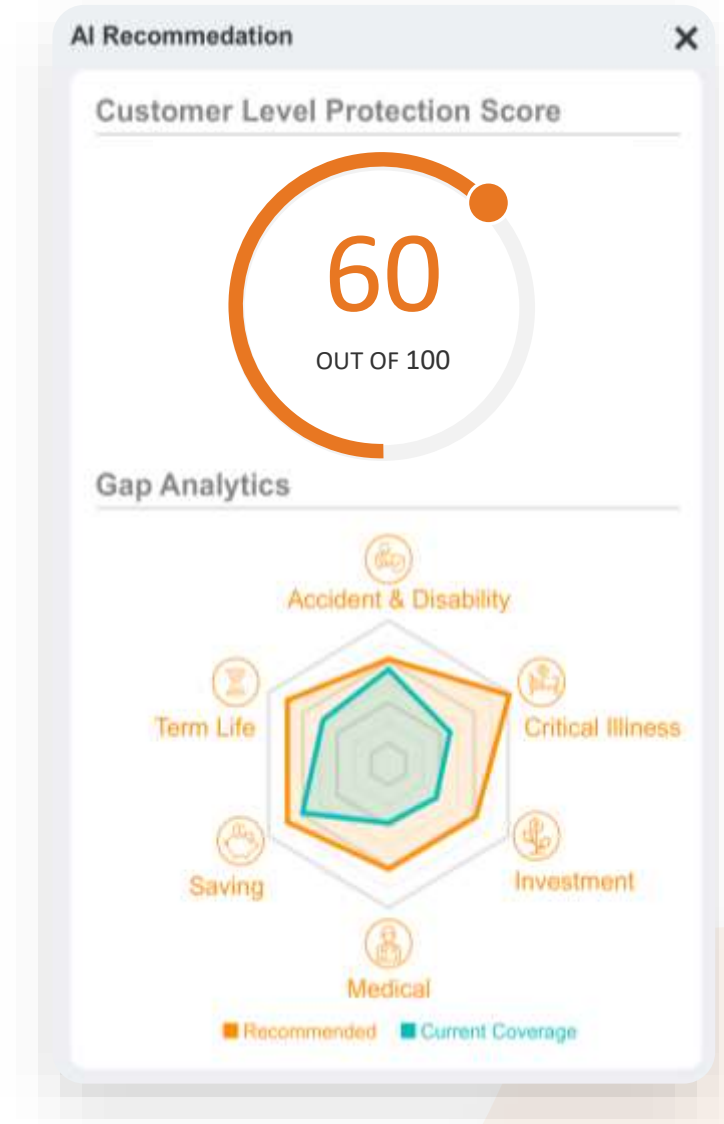
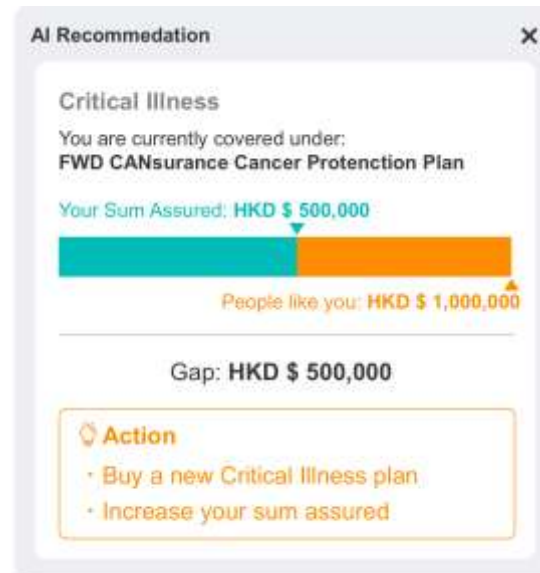
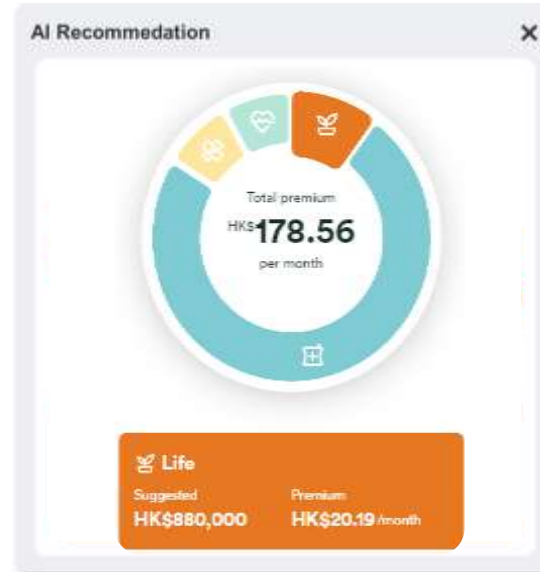
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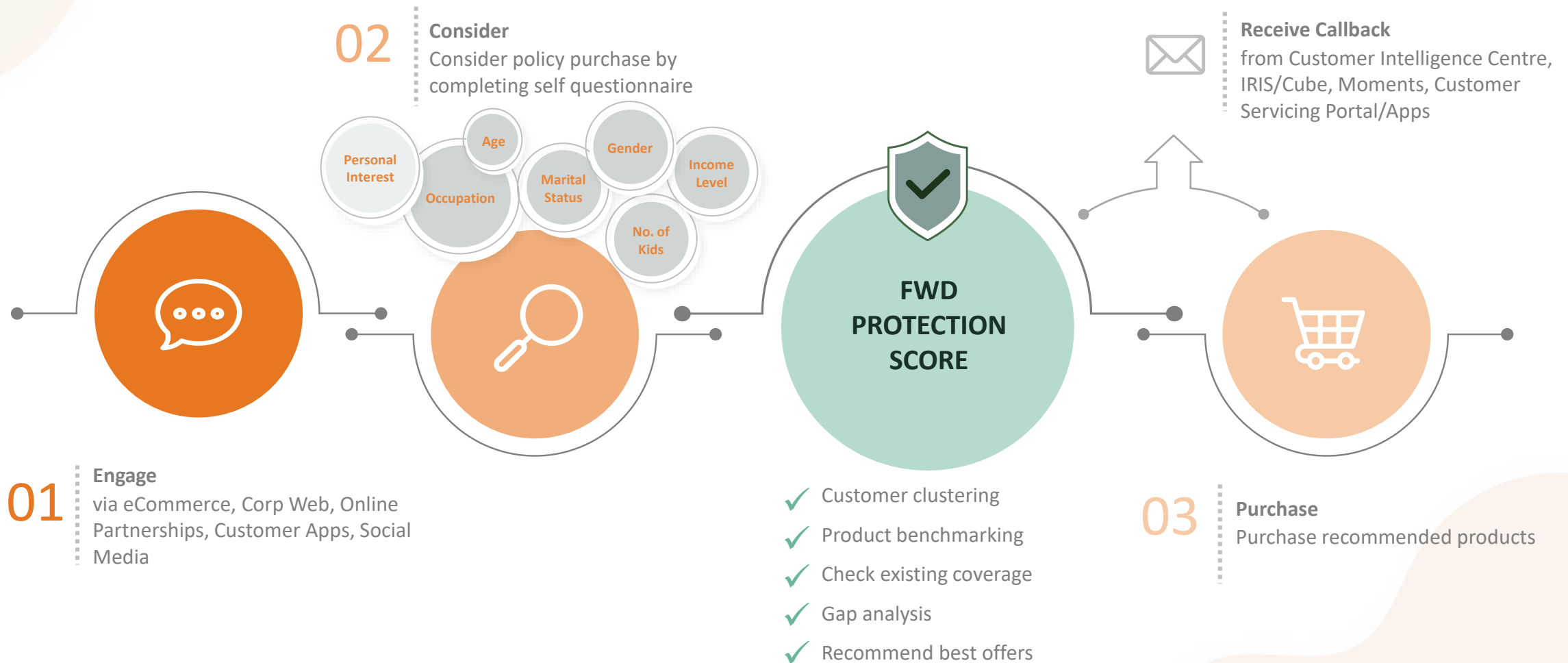
04

Make Recommendations
Recommend appropriate products and coverage



Our Solution

How do customers interact with us?





Celebrate living
fwd.com

Thank you