



DIGITAL SELLING EXPERIENCE FOR FINANCIAL SERVICE ORGANIZATIONS

Convert Early Leads to Wins

Microsoft
Partner



2021 Partner of the Year Winner
Financial Services Award
Global SI Digital Transformation Award
Analytics Award

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INDUSTRY: FINANCIAL SERVICES, INSURANCE

Capgemini's Digital Selling Experience solution is designed to help financial service organizations augment their sales platform providing the necessary tools to their agents & advisors enabling omnichannel experience for potential new customers. This B2C solution helps businesses with rapid prototyping to enable digital channels to engage with new customers, using Microsoft's low-code/no-code technologies.

CHALLENGES

- Many Insurance agents and financial advisors lack the digital channels to engage with new customers effectively
- Institutes don't have the ability to provide their agents personalized, AI-driven chatbot
- Customers prefer high-touch experience from the comfort of their homes
- Typical CRM and Omnichannel solutions are expensive and/or require extensive customizations

IDEAL SOLUTION

- A simple solution which offers Voice, Video, Screenshare, and Chatbot capabilities
- A low-code/no-code solution which can be easily customized and rapidly deployed
- Agent experience is delivered via Microsoft Teams, which is implemented in most organizations

DESIRED OUTCOMES

- Our solution helps insurance agents and financial advisors provide a modern, yet personalized experience, virtually.
- With the omnichannel experience, time to value is significantly reduced.
- Organizations are not spending a lot of time and money on custom development and maintenance.





DIGITAL SELLING EXPERIENCE FOR FINANCIAL EXPERIENCES

Empowering Insurance Agents and Financial Advisors to Provide Digital Experience to Their Customers

1

Built on Microsoft Azure Cloud Services

- Leverages industry leading Azure Bot framework
- Customer and Agent/Advisor experience is available via Web Client or several other channels
- Seamless B2C integration
- Completely customizable and modular

2

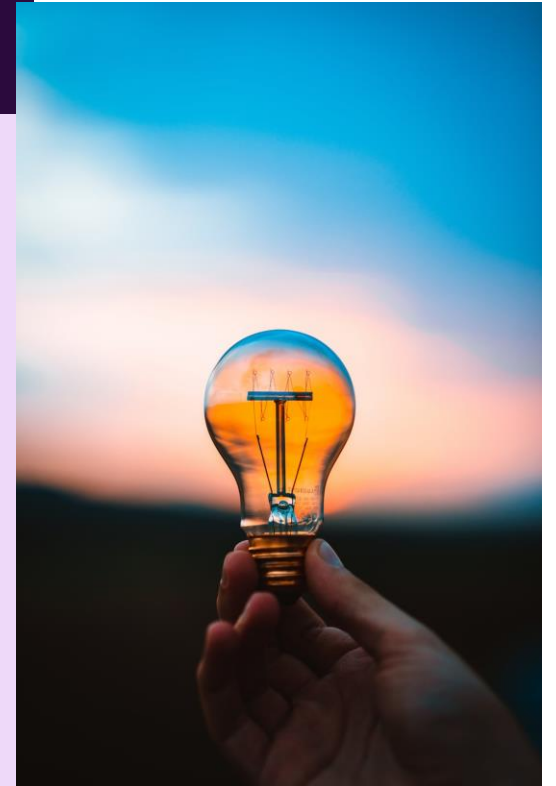
Low Cost

- Low-code/no-code means minimal development and maintenance cost
- While integrations with MS Teams, Omnichannel, and Power Platform are available, they're optional and such licenses are not mandatory
- No vendor lock-in or third-party licenses required*

3

Secure and Compliant

- Deploy the solution in your Azure subscription
- Chat conversations can be retained as per privacy laws and regulatory compliance
- Customers leveraging MS Teams can record audio/video calls for compliance and training purposes





WHAT DOES DIGITAL SELLING EXPERIENCE MEAN FOR YOUR BUSINESS

Let the Virtual Assistant Do the Work for You!



Bots can Look up Agent/Advisor Calendar and book an in-person or virtual appointment with customer



Customers can get answers to FAQs using Multi-turn Conversational AI



Provide human-like conversational experience using Language Understanding (LUIS) and Sentiment Analysis



Get notified on new sales leads on Teams Channel, Email, or other channels



Trigger Teams App or a workflow, update CRM, call an API, Invoke another Bot and much more!

How Can Agents/Advisors Create Value for Customers?



Using screenshare, guide customer to pick the best insurance policy, investment option, or show them how the bundle option can save them money



Provide facetime to customers virtually, save them the trip, improve customer satisfaction and increase the win rate!

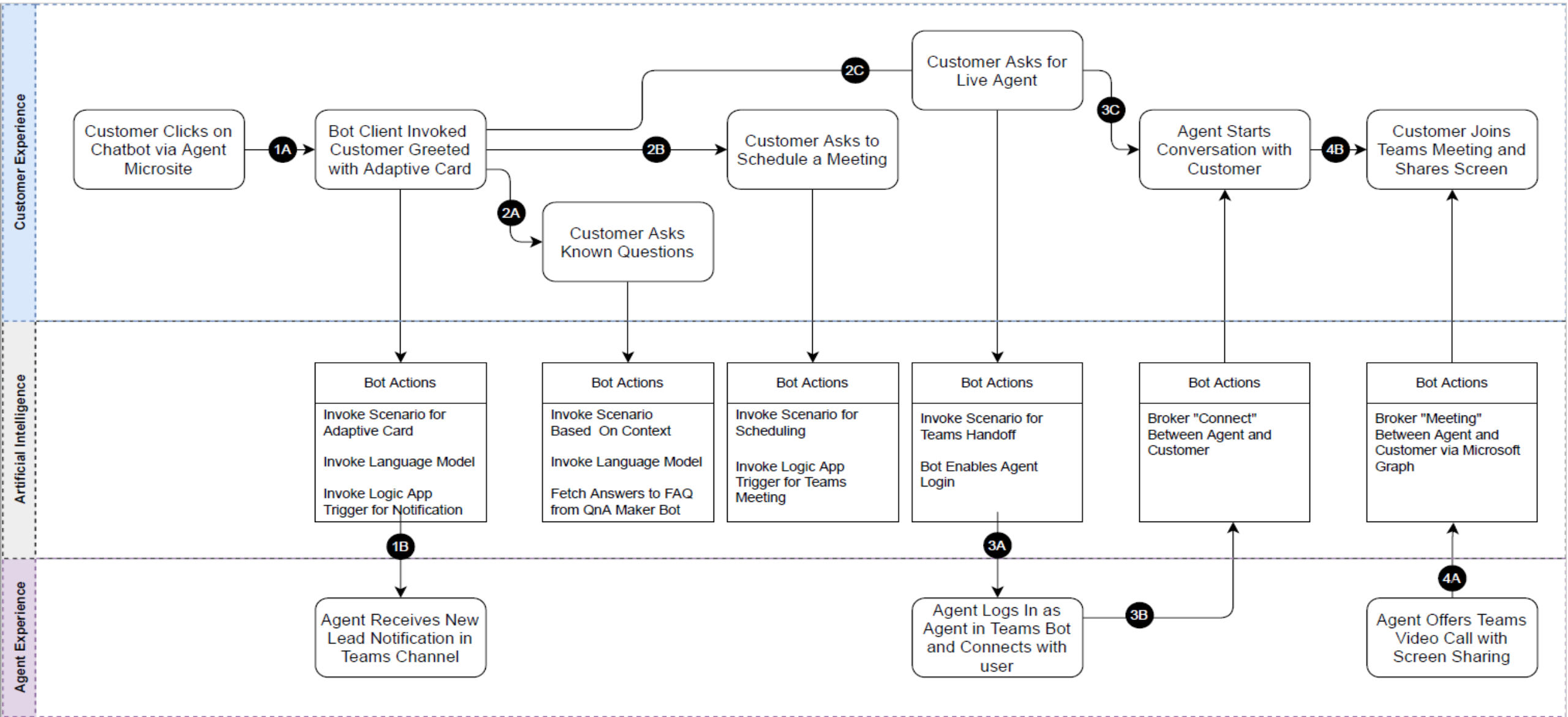


Include additional experts to the voice/video call to provide expert advice or instantly resolve customer concerns



Increase the reach to customers by publishing your bot on Facebook, WhatsApp, Alexa, Skype and several other channels

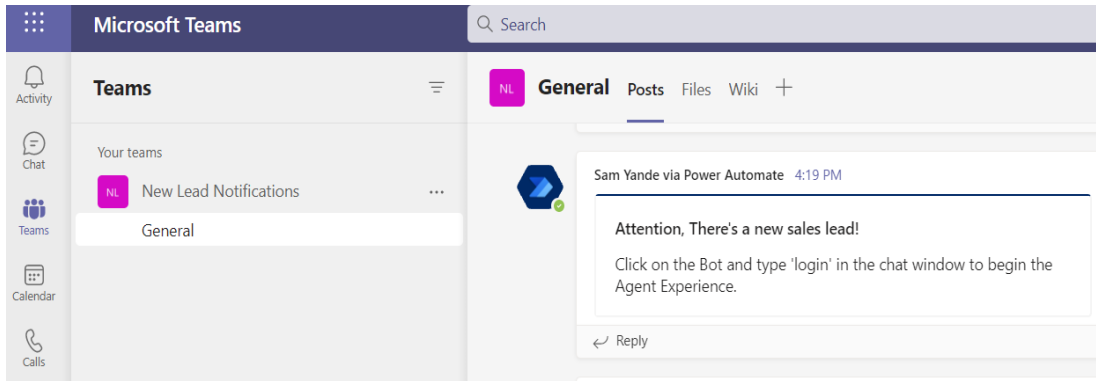
EXAMPLE JOURNEY MAP FOR CUSTOMER AND INSURANCE AGENT – POWERED BY AI



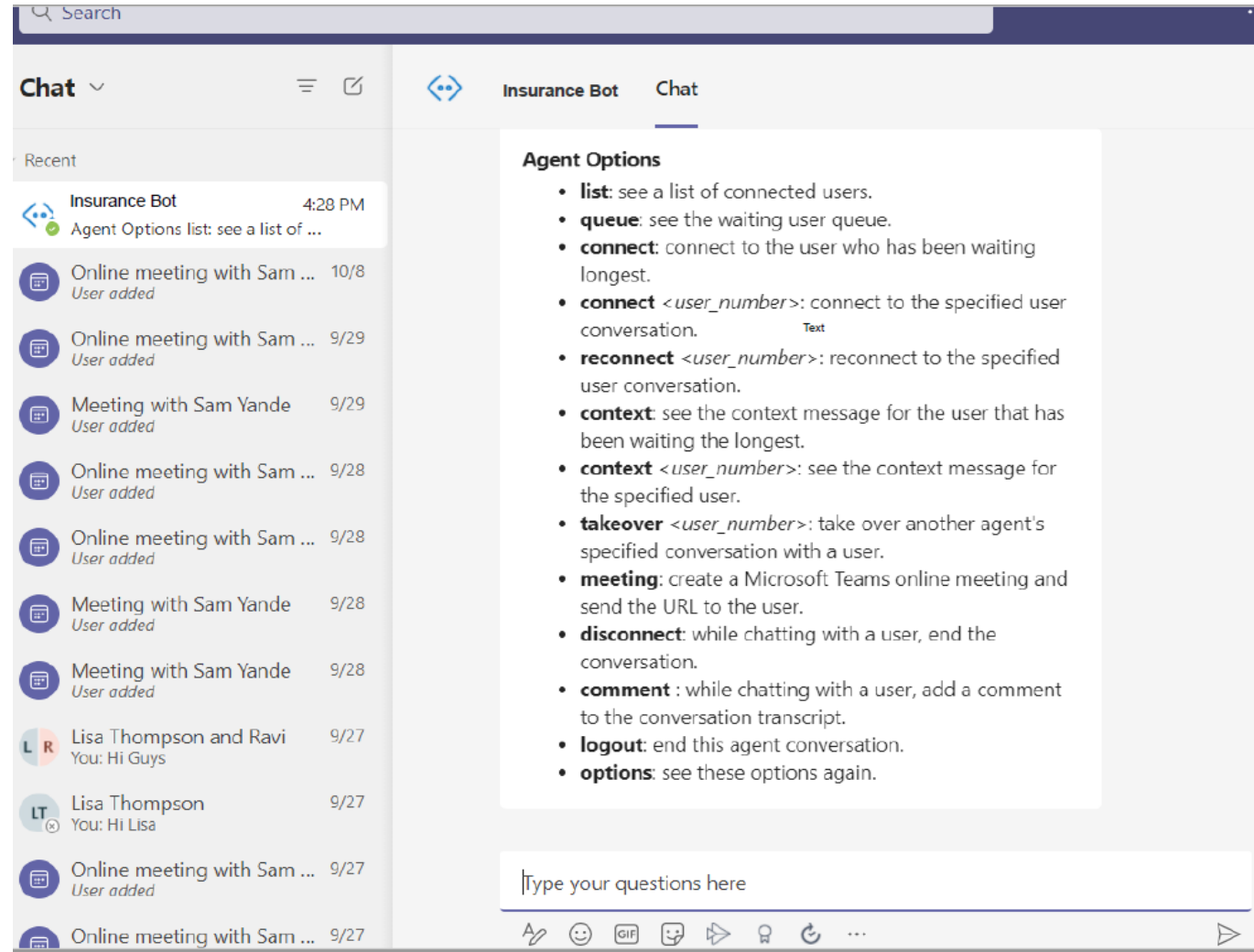


AGENT EXPERIENCE SCREENSHOTS

Teams Notification as soon as customer clicks on Chatbot



Commands for Agent to take over bot and have live conversation with customer





CUSTOMER EXPERIENCE SCREENSHOTS

Your Local CG Insurance Agent

Sam Yande
Since 2002

Hi! My name is Sam Yande, and I look forward to working with the Greater Austin community to help meet policyholders' insurance needs. I have full-time staff fluent in several languages including Spanish, Hindi, Marathi, and Gujarati. I serve many of the insurance needs of customers all over Austin including Round Rock, Pflugerville, Georgetown, Hutto, Elgin, Bastrop, Del Valley.

Agency Name: CG Insurance
Address: 2300 Grand Ave Austin, TX 78224
Phone: 512-209-6609
Email: samyande@cginsurance.com

Schedule A Meeting

Get Started with Auto or Home Insurance Quote

Visit My Website

How can I help?

Just now

Type your message

Get Started with Auto or Home Insurance Quote

Visit My Website

How can I help?

Just now

Natural Language Processing in action → office hrs You

Just now

Here are my office hours, address and contact information:

Agency Name CG Insurance
Address: 2300 Grand Ave Austin, TX 78224
Office Hours M-F - 9:00AM - 6:00 PM
Phone: 512-209-6609
Email: samyande@cginsurance.com

Just now

agent You

Just now

Do you want to talk to an agent?

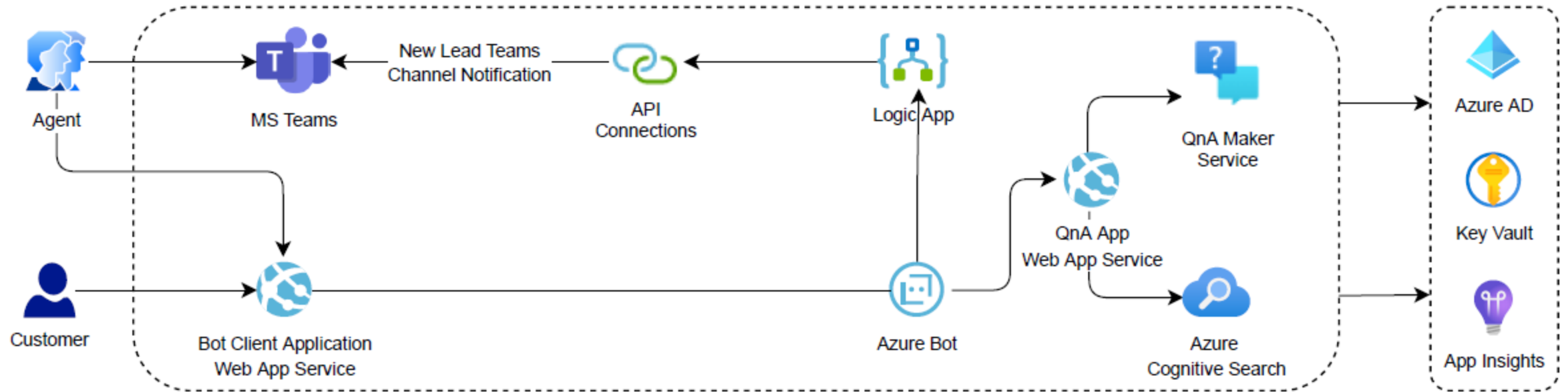
Just now

Yes No

Type your message

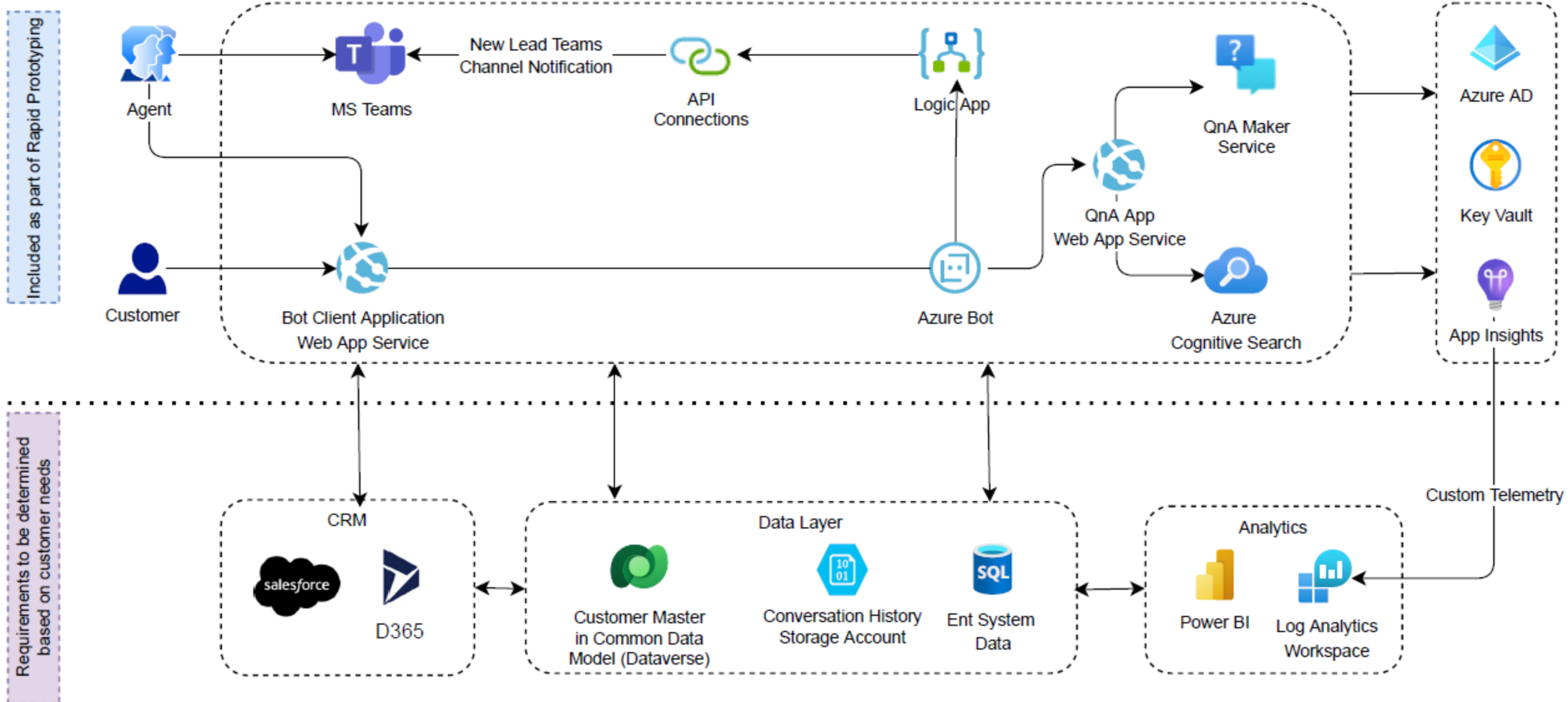


AZURE ARCHITECTURE FOR THE ILLUSTRATED JOURNEY MAP





SOLUTION ARCHITECTURE WITH ENTERPRISE INTEGRATIONS





6-WEEK RAPID PROTOTYPING ENGAGEMENT MODEL



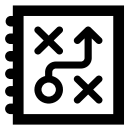
PLANNING – 1 Week

- Engage with key stakeholders
- Define scope and success criteria
- Assess Environment Readiness



SOLUTION DEVELOPEMNT AND IMPLEMENTATION– 4 Weeks

- Deploy Azure Bot and other Services
- Configure Language Models
- Configure Out of the Box and Custom Scenarios
- Make Chatbot Webapp available as iframe to be integrated in the insurance agent portal
- Enable Teams Integration
- Deploy Agent Experience



FEEDBACK & BACKLOG CREATION – 1 Week

- Demonstrate integrated Chatbot, Customer and Agent Experience, and Voice/Video/Screensharing capabilities
- Seek feedback from key stakeholders on the prototype
- Define high Level Epics for enterprise integrations and org-wide rollout
- Conclude prototype

CAPGEMINI DIGITAL SELLING EXPERIENCE FOR FINANCIAL SERVICE ORGANIZATIONS

Microsoft Partnership:

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Learn more:

Link to your Microsoft Commercial Marketplace offer

Microsoft
Partner



Gold Cloud Platform
Gold Security
Gold DevOps
Gold Application Development
Gold Data Platform





About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of 270,000 team members in nearly 50 countries. With its strong 50 year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fuelled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2020 global revenues of €16 billion.

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