Chat121 Case Studies

Not sure what phrases to use to go to these Case Studies – need to try some words

**Case Study 1 claims management automation**

Life Insurance company wanted to automate their claims management. <br />  
Implemented claims management system covering claims notification, registration, assessment, investigation, approval/decline & appeals with letter templates & routing. Handles claims for death, TPD, hospitalization, critical illness, surrender.

**Case Study 2 Cross platform mobile Point of Sales**

Life Insurance company wanted Cross platform mobile Point of Sales solution for Bancassurance and Agency able to issue Policies offline. <br />  
Mobile hybrid (iOS, Android & Windows) Point of Sales for Bancassurance & Agency, with contact/activity management, presentation, sales illustrations, auto-configure products with 5 questions, proposal, auto-underwriting & policy issue. Bank staff completed sales offline including policy issue at bank branches. Proposal data submitted to back-end day end.

**Case Study 3 Referral Management**

Bank wanted to increase sales via Staff & Customer Referrals for Banking, Insurance & Takaful products. <br />  
Implemented Referral Management System allows staff (and soon customers) to refer leads, that are auto assigned to sales team, successful sales data synchronized from back-ends to compute referral KPI points and integrated with mobile POS. Significant increase in referrals year on year, with very high closing ratio, due to effective reporting and management of referrals.

**Case Study 4 Digital Insurance Strategy**

Life Insurance company looking for a Digital Strategy to build a Company Wide Digital Transformation Plan. <br />  
Review current state, created awareness of digital insurance, built Digital Insurance Strategy Plan, review and refined priorities, created business case and BOD presentation.

**Case Study 5 Agent marketing via Social Media**

General Insurance Company wanted to enable Agents to engage with their prospects and customers via Social Media. <br />  
Built a social media strategy for agents (approved globally), trained agents on use of Social Media, run campaigns, setup Social Media monitoring and response SOPs. Developed and managed agent content for posting to Social Media sites. Provided outsource social media management services for the agent FB page. Creating content and ran campaigns.

**Case Study 6 Consulting of Sales Process**

Singapore Life Insurance company Consultancy & Advisory for Regulatory Compliant Mobile Sales Process & Architecture. <br />  
Prepared requirements, sales process, CFF compliance documents, test scenarios and test scripts for mobile point of sales for bancassurance. Involved in UAT and quality assurance reviews. Successfully launched based on these processes.

**Case Study 7 Distribution Management for Corporate Agencies**

Life Insurance company looking for Corporate Agency solution to process performance, commission, bonus allocation, tax & payment to agents. <br />  
Corporate Agency Management SaaS model. Admin manages agent movements. Receive data from core back-end system, processes performance, commission, bonus & tax. Accessed online by corporate agency and agents. Runs on secure dedicated servers managed by 121Advisor. Improved sales, easier management with reduced administration costs using SaaS model.

**Case Study 8 Distribution Management for Corporate Agencies**

Life Insurance & Unit Trust wanted a solution to manage Insurance & Unit Trust that process performance, commission, bonus allocation, tax & payment to agents. <br />  
Corporate Agency Management SaaS model. Admin manages agent movements. Receive data from core back-end system, processes performance, commission, bonus & tax. Accessed online by corporate agency and agents. Runs on secure dedicated servers managed by 121Advisor. Improved sales, easier management with reduced administration costs using SaaS model.

**Case Study 9 Digital Strategy**

Life Insurance company want to implement their Digital Strategy for website, mobile point of sales & customer portal. <br />  
Using Customer First Connected Enterprise Digital framework implemented 1st Phase: Responsive, SEO Corporate Web Site, Hybrid Mobile Point of Sales , Customer Self Service Portal, Direct Online Insurance Purchase. Website response faster, added SEO optimization. Mobile POS (iOS, Android, Windows) sales illustration & e-proposal submission. Customer portal integrated with back-end admin, ePayment gateway & document management system.

**Case Study 10 Full digital solution**

Family Takaful Operator wanted a full outsourced digital takaful services, integrated with their back-end admin system. <br />  
Outsource implementation & hosting for: Responsive, SEO Corporate Web Site, Hybrid Mobile Point of Sales , Customer Self Service Portal, Direct Online Insurance Purchase. Website implemented according to global standards. Full integration with back-end administration system, ePayment gateway & document management system.

**Case Study 11 Direct Online Insurance**

Life Insurance company wanted to launch direct online insurance portal, with easy product configuration and content for marketing customer journeys & CTAs. <br />  
Implemented a direct Online Insurance Purchase with easily configurable products (using EPC). Marketers can easily create articles & blogs via templates, tracking of consumer interactions, with live chat. Outsourced on SaaS hosted services by 121Advisor. Marketing teams can track consumer interactions and assess where drop-off occurred & revise customer journeys & CTAs. Options for A/B & multi-variate testing.

**Case Study 12 Customer Portal**

Life Insurance company wanted Customer Self-Service Portal to be delivered in short period of time. <br />  
Implemented Customer Self-Service Portal with Integration to 2 Back-End Systems. Went live in 4 months. Ongoing enhancement to add more self-service transactions integrated with back-ends.

**Case Study 13 Customer Portal**

Life Insurance company wanted Customer Portal to be delivered in short period of time. <br />  
Implemented Customer Self-Service Portal with Integration to Back-End System. Went live in 3 months. Ongoing enhancement to add more self-service transactions integrated with back-end.