Chat121 Phrases for 121Advisor Website

Explanation of key phrases which link back to our solution components

**Customer First**

Putting the customer first is essential for customer-retention and customer-loyalty. Customer first, means that you are putting the needs and requirements of a customer ahead of everything else. Oriented towards serving the customer needs, and measure customer-satisfaction levels in order to determine the success of your business.

The ‘Customer First Connected Enterprise Digital Framework’ manages customer experiences from prospects, leads, customer service, using Robotic Process Automation to ensure enquiries are followed up to meet customer satisfaction levels.

Would you like me to send you some information about Customer First Connected Enterprise? [Yes]

*Hints: Referral Management ReMMA|Customer Service CSSP|Chatbot FITbot|Chatbot FITbot|Online Community CeMD*

**Personalized Engagement**

Personalized Engagement is critical to getting more sales and building customer trust. 80% of consumers say that if the content or product does not meet their need, they will exit & jump to another site.

The ‘Customer First Connected Enterprise Digital Framework’ automatically identifies the persona of a person, and uses this to offer personalized content and products. For example, if you have a family, then personalization will send articles on child education with products that meet these needs.

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**Marketing Automation**

Consumers & Customers go through multiple stages of their life cycle, from single, married, family to retired. Marketing Automation allows you to deliver them the right content and initiate sales activities in a personalized way, as well as running personalized campaigns to cross sell or upsell new products based on their needs.

The ‘Customer First Connected Enterprise Digital Framework’ enables you to quickly build personalized automation workflows for prospects and customers, and create target campaigns matching their needs.

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**Lead nurturing**

Lead nurturing is the process of engaging a defined target group by providing engaging content at each stage of the buyer’s journey, by establish yourself as an expert in what you offer. You want to actively move the prospects through your marketing and lead generation efforts, to the point where they become paying customers.

The ‘Customer First Connected Enterprise Digital Framework’ offers lead nurturing both to prospects as well as to customers in order to build a trusted relationship, by offering relevant information and products at the right time.

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**Robo Advisor**

Robo advisors provide financial advice online with minimal human intervention. They provide digital financial advice based on mathematical rules or algorithms which are computed online and thus financial advice do not require a human advisor, unless requested by the user.

The ‘Customer First Connected Enterprise Digital Framework’ multi-lingual FITbot Robo Advisor enables consumers 24x7 personalized engagement, to get information about their lifestyle financial goals and understand how much they need. Consumers can then decide to buy online or connect with an advisor.

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**Referral Management**

Referral management bridges the gap between marketing and sales. It is a customer acquisition process which identifies potential buyers, educates them, engages with them, and when the leads are considered qualified, get passed to financial advisors.

The ‘Customer First Connected Enterprise Digital Framework’ referral management and marketing automation has been successfully used to significantly increase sales and improve closing ratios. It is used to get referrals from staff, third parties and customers.

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**Customer Journey**

A customer journey map tells the story of the customer’s experience from initial contact, through engagement and into a long-term relationship. It identifies what they want to achieve, and what are their expectations of the organization.

The ‘Customer First Connected Enterprise Digital Framework’ enables teams to define and track customer journeys for websites, portals and chatbots. Tracking enables us to identify where consumers drop off, enabling you to change the journey and test again using AB testing.

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**Personas**

A persona, is a fictional character created to represent a user type that might use a site, brand, or product in a similar way. Marketers use personas together with market segmentation, where the qualitative personas are constructed to be representative of specific segments.

The ‘Customer First Connected Enterprise Digital Framework’ enables you to creating personas in order to understand your users’ needs, experiences, behaviours and goals. Then define scoring rules to auto-assign consumers to specific personas based on their interaction with the website and data that you capture.

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**Lead Scoring**

Lead scoring is a methodology used to rank prospects against a scale that represents the perceived value each lead represents to the organization. The resulting score is used to determine which leads a receiving function (e.g. sales, partners, tele-prospecting) will engage, in order of priority.

The ‘Customer First Connected Enterprise Digital Framework’ enables you to define both personas and lead scoring to target segments or people looking for specific needs. Lead scoring dynamically updates the scores based on changes to contact details and activities, which can then be used for personalized campaigns.

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**Personalized campaigns**

Create personalized campaigns where each step is defined by previous customer interactions with your brand.Knowing exactly who it is that you are trying to sell your products to is hugely important if you want to be able to use your resources more efficiently, by identifying the persona for that campaign, including information such as their age, their occupation, their wealth and class status, their family situation.

The ‘Customer First Connected Enterprise Digital Framework’ enables you to create campaigns, identify the target group based on persona or lead score, track the responses to monitor drop off, and use A/B testing to identity the best campaign option.

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**Delivering Effective Campaigns**

Marketing Automation can increase your marketing effectiveness and the ROI of your campaigns through triggering follow up activities to nurture prospects.

The ‘Customer First Connected Enterprise Digital Framework’ enables you to create and monitor campaigns, and then trigger further marketing automation activities to nurture prospects, in event they are not ready to buy immediately.

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**Robotic Process Automation**

Robotic Process Automation (RPA) is an innovative technology which automates structured business processes. RPA works just like one of your employees, interacting with the user interfaces of your existing applications and carrying out structured processes automatically. Cost-effectively reducing human interaction.

The ‘Customer First Connected Enterprise Digital Framework’ uses RPA to automate processes for marketing, customer servicing and predictive analytics scoring triggers. It can verify data, auto-assign to service staff, track the status and if not completed within the service period, escalate to management.

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**Connected Enterprise Digital Framework**

A Connected Enterprise Digital Framework objective is to Enable Personalized Digital Transformation, from Marketing, Sales, Customer acquisition and Servicing. By engaging with consumers and customers 24x7 knowing what the consumer has done before and personalizing responses.

The ‘Customer First Connected Enterprise Digital Framework’ helps insurers and takaful operators digitally transform their engagement with consumers and customers with its omni-channel interaction combining multi-lingual chatbots, referral management, customer portal and Robotic Process Automation to offer 24x7 personalized engagement.

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**Predictive Analytics**

Predictive analytics is used in appraising and controlling risk in persistency, underwriting, pricing, rating, claims, marketing and reserving in Insurance sector. Predictive analytics is used in the areas of persistency, underwriting, claims and marketing.

The ‘Customer First Connected Enterprise Digital Framework’ has recently launched its predictive analytics model for marketing and predicting when a person may lapse their policy. Additional predictive models will be rolled out for underwriting and claims.

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*Hints: Customer Service CSSP|Chatbot FITbot*

**Engage existing customers**

It is important to engage with customers in order to automate customer onboarding by providing useful tips and educating them on how to get the most out of products or services via personalized engagement.

The ‘Customer First Connected Enterprise Digital Framework’ uses the customer service portal, to auto-assess personas and scoring to identify a customer’s needs, then using Robotic Process Automation (RPA), to send relevant tips and product offers to the customers, and notifying the agent when to follow up.

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**Buyer guidance**

Lead buyers through their customer journeys helping them understand their financial needs and recommend products, to complete their purchase.

The ‘Customer First Connected Enterprise Digital Framework’ using its multi-lingual Robo Advisor engages with the prospective buyer to help them understand their financial goals, understand how much they need and recommend products. The buyer can then either buy online or connect with an advisor near by.

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**Not Part Of Chatbot**

**Specific Information**

**Data Extraction and Loading**

* Extract Data from the RMS and CRM system and loaded into the Campaign Lead Management Solution (CLMS).

**Prospect Tagging**

* Each customer record will be tagged to facilitate the marketing activity.
* Proposed tagging to include “Data Source”, “Campaign Segment”, “Lead Category”

**Lead Category**

* Leads loaded from CRM will be categorized as “Cold Leads”, agents will be making cold calls.
* Leads loaded from RMS will be categorized as “Warm Leads”, the prospects are actually interested in certain products and have left their contact details

**Campaign Segmentation**

* RMS Campaign / Product Promotion - Email marketing campaigns can be conducted effortlessly and can be configured to be run automatically based on the prospect tags - Microsite to Drive Traffic from Corporate Website to target Direct Clients

**Lead Assignment & Tracking**

* Assign the lead based on a round-robin basis as well as location (eg: Branch) and will automatically track the lead status. In the event that the lead has not been acted upon, after a predetermined time, the lead will be “returned” to the pool and reassigned.

**Sales Activity Mobile App**

* SAMA allows the Agent to plan and manage their time and be equipped with the necessary sales kit on their mobile device
* SAMA also allows the supervisor or manager to monitor the performance of the agents and to take corrective action is required.