

Adapting in **The Digital Space**



CASE STUDY

The Web Design & Development experience and Customer Engagement Program by Upshot Live helped Leading Life Insurance Company in India.

THE BACKGROUND

The Life Insurance Company was facing difficulty in Agency Channel to manage the daily operations of insurance advisors. Managing the enquiries, leads, individual generated business, prospective customers, information about the company's products & services, access to the operational system and their training are a few of the functions that need to be streamlined. This requires a digitized central system for advisors to operate & promote their own services.

THE CHALLENGE

To create a digital platform for managing & tracking the daily functions of advisors ensuring about the simplicity and thorough implementation of system.

SOLUTION - UPSHOT LIVE

Upshot Live suggested designing & developing a digital platform to manage, track and automate the functions of agency channel and simultaneously market the advisor's services by promoting over the digital space.

THE RESULT

Upshot Live analyzed and segregated the complex business processes of the Agency Channel of Leading Life Insurance Company in India. Interpretation & insight lead Upshot Live in designing & developing the digital platform. Upshot Live sorted the Information on the basis of customer accounts, business value, operational service access and service & offering from the company. Data is further segregated on the basis of specific functions. A simple & easy to understand dashboard helped company in tracking the KPIs. The solution resulted in:

- Higher efficiency: Advanced & improved Lead & Customer Management System.
- Increased Productivity: Trained & informed advisors know how to use digital platform.
- More visibility: Increased visibility by promoting specific individuals. Customer oriented: Improved & streamlined client interaction.

