

CHATBOT IN INSURANCE

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THE PROJECT

E N **S** U R

 Business
& Decision

UnderCover 

NEEDS & VALUE PROPOSITION UnderCover



Retail Consumers

- What am I insured for ?
- How well am I insured?
- How are people like me insured?
- How do my life events or market changes impact my risk ?

- Provide innovative “first-line” advice
- online available 24/7
- user-friendly
- fact-based

Needs

Value



Brokers & Agents

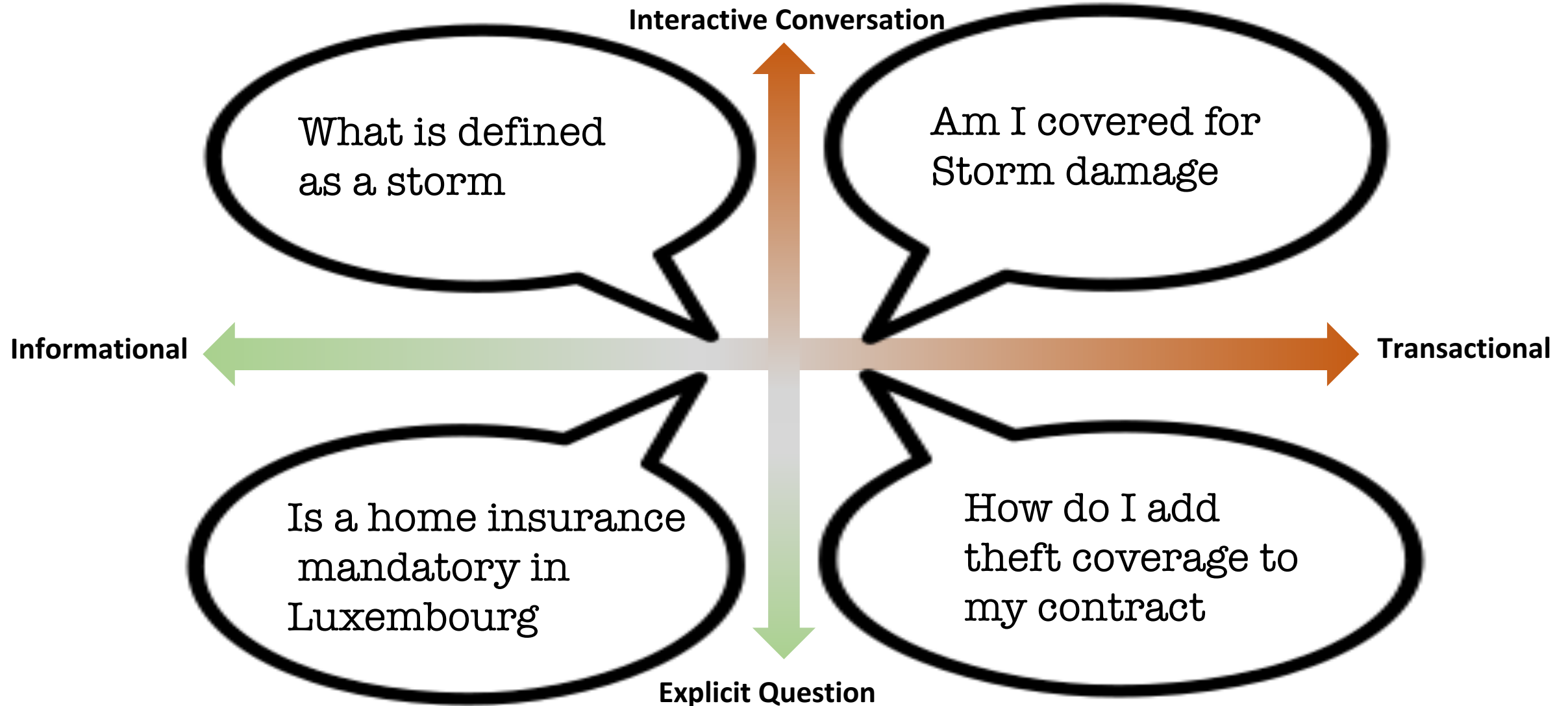
- How to give personalized advice, 24/7 ?
- How to increase client interactions?
- How does my client portfolio compare to other intermediary?
- How do clients respond to marketing actions?

- Enhance sales effectiveness
- managing platform content and life event triggers that stimulate traffic, increase client interaction and generate new leads
- providing analytical insights in customer profiles and customer responsiveness to commercial actions

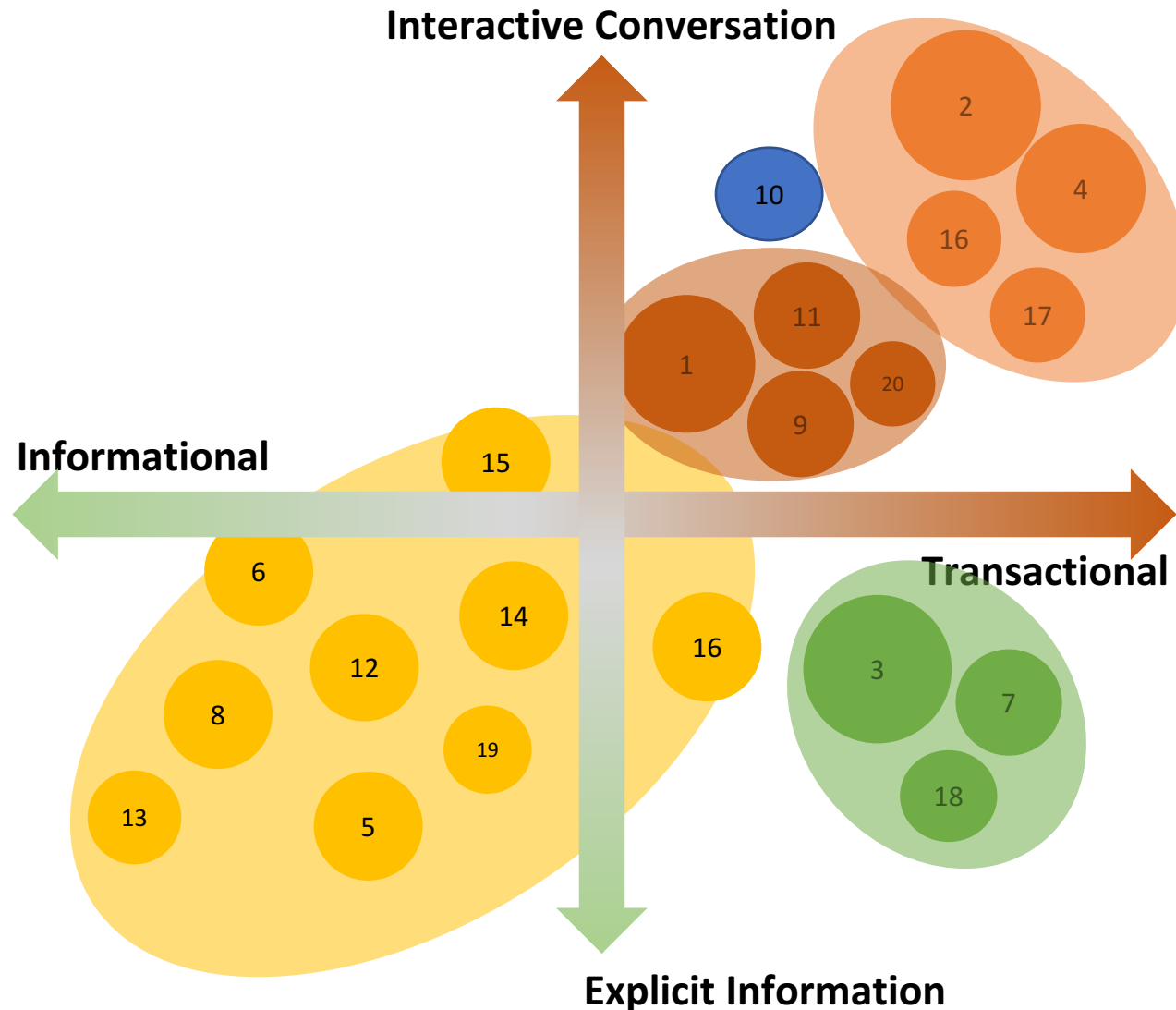


Insurance Carrier

FIND THE COMPLEXITY



top 20 cases



| # | Client Stories(Reference Cases) | Estim Requests (Yearly) |
|----|---|-------------------------|
| 1 | asks for more information (invoice, benef info...) regarding a transaction | 3588 |
| 2 | suspended for compliance reasons | 6772 |
| 3 | is proactively informing me that one or several payments have been rejected (including reason of reject) and is proposing me to re-issue | 5617 |
| 4 | I need to show a proof of payment to my beneficiary | 3951 |
| 5 | is proactively informing me that one or several payments have been rejected (including reason of reject) and is proposing me to re-issue | 3183 |
| 6 | Please give me the contact details of the payer (name & address) | 3137 |
| 7 | I need more information on a credit entry on my account : address / country, object, ordering bank or account | 2568 |
| 8 | I need to show a proof of payment to my beneficiary | 2340 |
| 9 | As a beneficiary, I am asking for a copy/scan of check(s) (part of remittance) as I need more details on the issuer (name or address) for accounting / reconciliation purpose | 2056 |
| 10 | My bank is informing me that will be unavailable due to production operations | 1771 |
| 11 | I would like to cancel/recall my payments | 1670 |
| 12 | proactively informs the that a payment has been suspended for investigation purposes | 1597 |
| 13 | I want to be sure that my payment will be executed - I do not see a confirmation that my file has been received, processed and/or executed | 1326 |
| 14 | I need more information on the credit entry on my account as I do not understand what is this payment (e.g. is it a rejection?) | 1191 |
| 15 | I am expecting a credit on my account and I want my bank to inform me as soon as I receive the funds | 1149 |
| 16 | I've lost a check but I want to be credited of the corresponding amount (letter of guarantee) | 1095 |
| 17 | My bank is proactively informing me that one or several payments have been rejected (including reason of reject) and is proposing me to re-issue | 1075 |
| 18 | I need to understand why my payment has been rejected | 1007 |
| 19 | I need to show a proof of payment to my beneficiary | 1007 |
| 20 | I am expecting a credit on my account and I want my bank to inform me as soon as I receive the funds | 911 |
| | The bank proactively informs the client of a problem to process the payment (wrong beneficiary details, no info about correspondent bank, no cnaps code...) | 47013 |

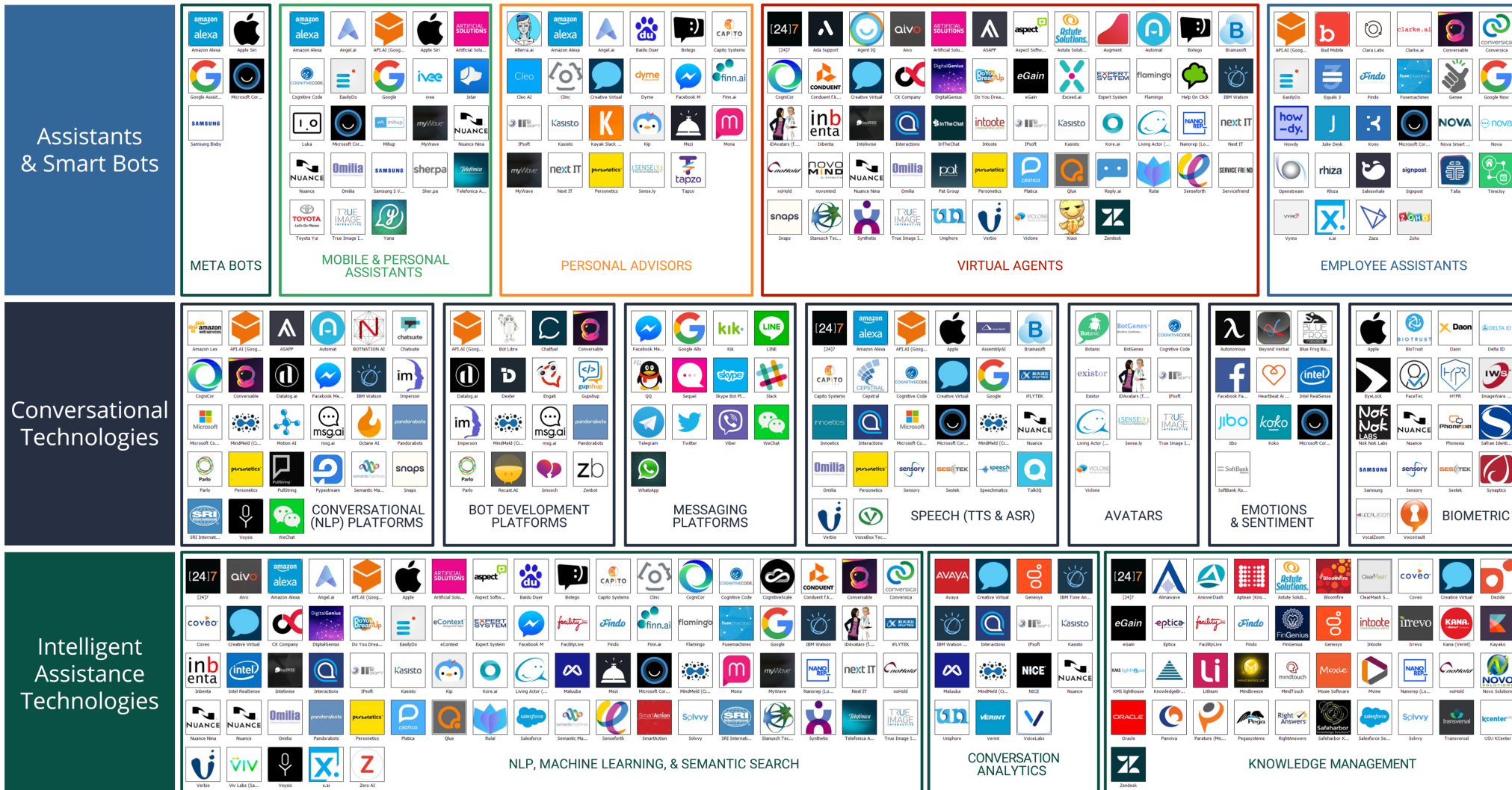
| Cases ID | Clustered story | #grouped cases | Sum of Estim Requests (Yearly) |
|----------------------|---|----------------|--------------------------------|
| 5,6,8,12,13,14,15,19 | Need information on payment status, credit entry, payer and/or issuer details | 8 | 14931 |
| 2,4,16,17 | Blocking payment - rejection | 4 | 12893 |
| 3,7,18 | Proof of payment | 3 | 9193 |
| 1 | Blocking payment - compliance | 1 | 3588 |
| 9 | Blocking payment - Connexis will be unavailable | 1 | 2056 |
| 11 | Blocking payment - suspended for investigation | 1 | 1670 |
| 20 | Blocking payment - problem in process | 1 | 911 |
| 10 | Cancel/recall payment | 1 | 1771 |
| Grand Total | | 20 | 47013 |

FIND THE TECHNOLOGY

DESIGNED BY
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Intelligent Assistance and Bot landscape

POWERED BY
VB | Profiles





UnderCover

Demo