



# Sales force automation

- a leading Indian Private Life Insurer

EX!LANT

## About the client

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A leading private life Insurance company in India with over 1400 offices

## Business drivers for the initiative

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Need to automate sales function to enable mobile workforce to sell Life Insurance products/schemes on tablets. Manual Order filling was a cumbersome process and the client saw tremendous opportunity to get closer to the customer.

## Envisaged solution

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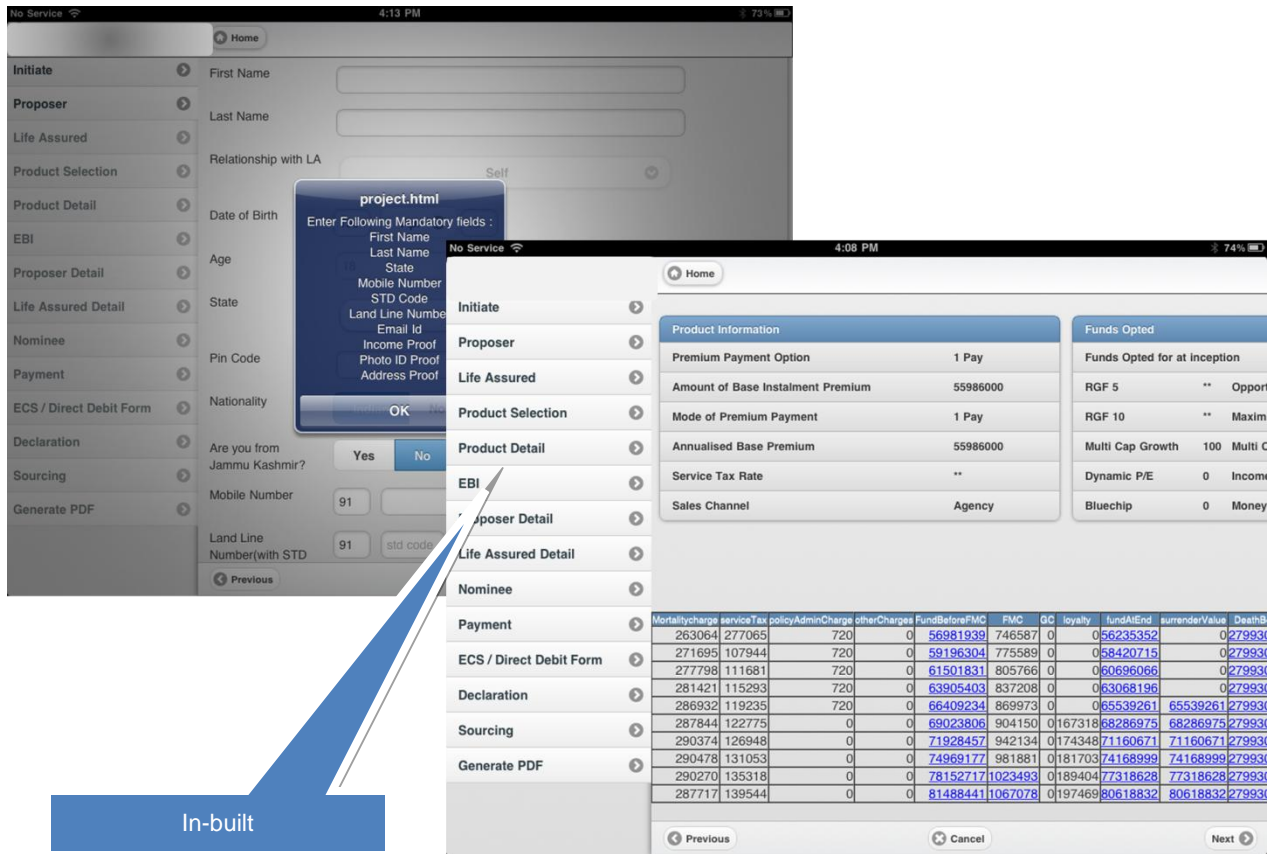
The solution comprises a web app with options to browse and apply for various Life Insurance product offerings. Filling up of forms can be completed offline and later stored in a centralized database. A clean and simple UI is put in place to expedite the sign-up process.

## Screenshots

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Menu Item	Question	Yes	No
Initiate	Do you have any physical deformity /handicap?	<input type="button" value="Yes"/>	<input type="button" value="No"/>
Proposer	Do you have any congenital defect/abnormality?	<input type="button" value="Yes"/>	<input type="button" value="No"/>
Life Assured	Have you undergone or been advised to undergo any tests or investigations in the last 5 years ?	<input type="button" value="Yes"/>	<input type="button" value="No"/>
Product Selection	Have you ever undergone or been advised to undergo any surgery or hospitalised for observation or treatment in the past ?	<input type="button" value="Yes"/>	<input type="button" value="No"/>
Product Detail	Are you aware of or have you ever been treated or hospitalized for cancer, tumour, cysts or any other growths?	<input type="button" value="Yes"/>	<input type="button" value="No"/>
EBI	Have you ever been referred to an oncologist or cancer hospital for any investigation or treatment?	<input type="button" value="Yes"/>	<input type="button" value="No"/>
Proposer Detail	Did you have any ailment/injury/accident requiring treatment/medication for more than a week?	<input type="button" value="Yes"/>	<input type="button" value="No"/>
Life Assured Detail	Have you ever availed leave on medical grounds in the last two years?	<input type="button" value="Yes"/>	<input type="button" value="No"/>

Pdf generation on completion



## Benefits

This initiative is aimed at promoting the brand and broadening the customer base. This project is still in its nascent stages