



New age Field Force Application for boosting sales in Insurance vertical

About Customer

The customer is one of the largest insurance company in India and provides a large mix of insurance products for Individuals, Groups, SMEs and Armed Forces. It has a fairly large distribution network with 195 branches spread across 3000 towns in India. It also has a large Bancassurance channel with close to 40 tie-ups with different banks and financial institutions.

Customer requirements

The customer wanted to equip its sales force with mobile applications which would effectively mobilize them and reduce their dependence on branch and back office. Processes such as policy suggestions, term, premium and benefits calculation were required to be done by the sales team independently while also taking care of the complete customer on-boarding and payments.

Solution offered

- Mindgate created an Android based application for this purpose. Mobile Application includes Lead Management, Benefit Illustration, Proposal Form Filling, Online payments to buy the Insurance products, hassle-free documentation. It is complimented by a browser based application.
- The mobile application works in offline mode also so that the field force can do the necessary form filling where there is low or no signal and then submit the details whenever the signal is available. The forms in the app are designed with smart features to reduce the form filling time and TAT.
- Apart from the policy suggestion, on-boarding module the application is also integrated with payments gateway and has a lead management and in-built reporting module.

Implementation highlights

- Ready to go on the field approach brings confidence in operation
- Implemented within 6 months.
- Staff of 300 trained under “Train the Trainer program” in 1 month, 1700 field agents enabled.
- Technology Stack : Android Studios, Asp.net, SQL Server

Benefits accrued

- Hassle-free documentation, Faster TAT on customer conversion thereby generating faster revenues, mobilized sales force.

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