

# The Digital conversion in the insurance industry

*How to improve and revitalize  
your digital sales process?*



## THE CHALLENGE

*Would you want your customers to have access to their pre-contractual policy at any time anywhere?*

*Would you like to sign and contract your policy from any device even with a verbal consent with absolute safety and legal validity?*

*And what about having an agent that will answer doubts, questions and guide you in the process?*

*Find out how to use technology as a commercial strategy! Get close to your customers by introducing easy, efficient and safe digital processes.*

The Insurance Industry is devoting significant efforts to evolve their sales into a new digital business model. Nowadays, we are looking for omnichannel contacts that will provide the best Customer Experience, as a complement for classic channels. In the same direction, we require to improve efficiency to processes. We focus on customers and their activities, identifying their digital positioning, providing easy and fast quotations, solving process through the incorporation of the electronic or digital signature, and providing specialized support tailored to your needs.

## THE SOLUTION

Ibermática as a strategic partner in the digital transformation process, designs different approaches obtaining the best solution that generates a strategic impact in organizations.

Our partner Unblu and us invite you to discover our all-in-one solution that will encourage the digital switch-over of contracts and any other insurance process in the most organised, transparent and **safety** way.



Our client requests the service of an insurance policy through the website or the App.



The client fills out and submits the forms - include personal and confidential information- in order to identify and ensure if the good or service can be insured, and simulate the real conditions of the insurance coverage and policy.



IberDok generates the pre contractual documentation to the customer, who will be able to read, download and sign at any device, accepting the commercial offering and the terms on it.



Finally, the system automatize a video call in order to get the verbal consent of the customer. After this step we submit the insurance policy.



In the whole process a skilled attendant will be available to help through a conversation by chat, video, among others.

## AS A RESULT



The insurer has achieved a real-time contract, reducing time and providing a great digital experience.

These factors are key aspects that will increase your sales, making your company the market leader. We improve communication from a traditional E2E processes to a 100% digital experience.

All legal guarantees are fulfilled, avoiding unnecessary paperwork and visits to offices.

## *Solved events*

If we find out a client who is stuck in the same step more than 20 seconds.



We provide support by video call.

If we find out that a client wants to end the process without finishing it.



We provide the contact of an agent to solve doubts and finish the process with the digital signature.

If we find out that a client has interest but few time to understand and complete the contract.



We provide an appointment in order to help by video call with digital signature



 **iberDok**

**unblu**

*Ibermática*

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