



Automate New Business and Underwriting

Your customers expect quick response times from companies that are easy to do business with. Meet these expectations easily with OnBase.

Although product and price are the most important factors for customers when deciding to buy life insurance, research tells us that customers also expect instant feedback and ease of doing business. If their expectations are not met, they'll most likely move on to the next company.

OnBase removes paper obstacles.

OnBase automates the new business process improving the customer's and the business processor's experience.

A customer can apply for coverage and complete all of the necessary forms and documentation right on your website. After submitting the information, the customer can check the status of their application and other information you make available.

Once the customer's information is submitted, OnBase automatically initiates a workflow and prioritizes the documents. Your employees are notified of tasks they are expected via email and missing documents are automatically outlined. Supervisors have a complete view of all processes to increase efficiency. After a policy is approved, an automated approval letter is generated and mailed to the customer.

Other Product Features:

- Access Key Documents from within existing applications to eliminate toggling between systems, mitigate risk of rekeying error, and improve efficiency
- Over 140 canned and custom reporting capability for full visibility into your processes
- Web based access to accommodate remote agents, employees, and third parties
- Built in audit trail for all documents and processes
- Ability to assign work based on skill set or workload, or automated workflow routing
- Version control on all documents
- Ability to add notes, collaborate, or start discussions around a particular document or packet
- Built in timers and reminders to eliminate packet neglect or aging
- Capture and organize documents and packets automatically whether they're paper, email, fax, image or via web portal
- Share documents as needed with existing archival systems
- Can be deployed On Premise or in the Cloud
- Configurable workflow allows customers to create, modify, or delete workflows as business requires, without an IT engagement
- Configurable automated document retention rules
- Manage customer expectations, provide information, and improve experience with an external facing , secure customer portal

Need More Information?

