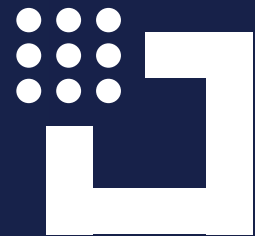


# Engage for Insurance

Relationship management for P&C, Life, and Specialty insurance



We understand that managing the insurance customer relationship is a team process. As digital insurance becomes the mainstay, insurers must build effective modernization strategies that meet their customers anywhere, and at any time.

## Product overview

Hitachi Solutions Engage for Insurance provides insurance companies with a practical solution to effectively manage and foster profitable relationships across agencies, customers, brokers, and other partners. The solution enables you to focus on all aspects of the insurance business and the customer lifecycle, from relationship and engagement management to business development.

### Engage for Insurance enables firms to:

- Deliver contextual experiences for any job role, including agents, service reps, underwriters, and producers
- Access real-time information when and where you need it on any device
- Create tailored processes for any engagement type, including sales, retention, and service
- Provide customized dashboards that provide visibility into performance and activity

### Distribution Relationship Management

Make distributor relationship management a competitive differentiator with this out-of-the-box module that provides real visibility into distributor performance.

- **Performance management:** Get a clear understanding of distributor performance including hit ratios, loss ratios, net promoter scores, agency surveys, and more
- **Agency enablement:** Enhance your agency relationships by engaging the right agency at the right time with planning tools, interaction journals, and an agency portal

- **Analytics and reporting:** Drill down into your business data and gain deeper insights into agency segmentation, policy management, and performance of your products
- **Licensing management:** Manage agencies and agent licenses proactively with tools that include automatic alerts for license expiration and automated license management tasks

## Direct Channel Management

Give sales, marketing, and service personnel the support they need to build a robust and efficient direct channel, track every detail from lead to premium, and more effectively monitor the ROI of marketing campaigns.

- **Performance management:** Gain unprecedented visibility into direct channel performance to better manage metrics like hit ratios, loss ratios, and customer satisfaction
- **Member and policy lifecycle management:** Manage lifecycles from prospect to issuance and beyond
- **Underwriting workload management:** Better track and manage applications and submissions as they move through the department
- **Sales management:** Manage sales leads and prospects by territory and product line
- **Member management:** Gain a 360-degree view of members and policies

## Producer Productivity Suite

Unleash producer productivity by giving them access to customer information, data analysis and reporting, and activity management, whether on a desktop or through a smartphone or tablet.

- **Producer portal:** Give brokers or agencies one portal to access the information and guidance they need, including self-help capabilities
- **Office productivity:** Get alerts, renew policies, manage communications with members, and view performance dashboards using familiar Microsoft Office tools
- **Mobility:** Empower agents with a platform for mobile productivity and on-site sales that gives them access to customer information and sales collateral

## Policy Integration Toolbox

Unite service applications, best practices, and telephony enablement in a consolidated agent desktop that helps speed resolution and provide personalized service.

- **Integration framework:** Put member information from multiple back-end systems into one view

- **AgentDesk Search:** Easily search across agencies or members to quickly identify each caller
- **Telephony Integration:** Automatically retrieve customer information in the context of each call so agents are prepared from the start
- **Automated activity capture:** Track how customer service representatives navigate the system and use that data to improve service processes

## Risk Management

Automate and organize risk assessment-related activities, including pre-quote surveys, loss prevention surveys, and claims review visits.

- **Pre-quote surveys:** Capture and manage all pre-quote information to accurately assess risks and price accordingly
- **Workflow automation:** Streamline activities through auto-notifications for activities such as claims reviews, agency visits, and other critical insurance lifecycle activities
- **Analytics and reporting:** Dashboard reporting to promote visibility and accountability of key performance indicators throughout the organization

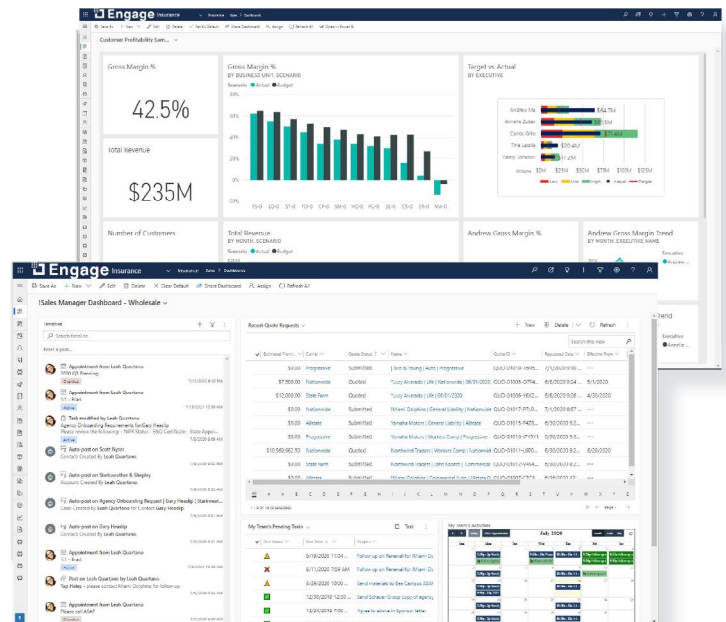
## What Our Customers Are Saying



We save seconds on every call, and we capture way more information. That's a huge benefit.



*VP Customer Care,  
Engage for Insurance Customer*



# Working with **Hitachi Solutions**

Hitachi Solutions has Microsoft technology expertise and market-leading skills in change management, business processes, and workplace advisory services. In short, we combine the best of both worlds — **technology and business**. We'll help solve your most pressing insurance industry challenges and deliver the **reliability, performance, and security** your business stakeholders and customers expect.

## How We Compare

### Team Experience

With over 16 years experience on average, our team members offer unmatched expertise throughout the entire project lifecycle.

### Industry Recognized Practices

From DevOps and automation of infrastructure to code delivery and regulatory compliance, our team is able to execute across the entire technology sphere.

### Collaboration

We build solutions for the modern era and meet your teams where they're at, whether in the office, remote, or across the globe.

### Guiding Practice Principles

Our four practice principles guide the way we work: High Quality, Continuous Feedback, Predictable Delivery, and Embrace Change.

### Let's Talk.

*Contact Hitachi  
Solutions today to  
learn more.*

### Get started today!

Email Us  [NA.Marketing@hitachisolutions.com](mailto:NA.Marketing@hitachisolutions.com)

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