Hitachi Solutions
Engage for Insurance

Better Address the Challenges and Opportunities in the Insurance Industry to Build a More Competitive and Profitable Business

Hitachi Solutions Engage for Insurance provides insurance companies with a solution to manage and foster profitable relationships across agencies, customers, brokers, and other partners. The solution improves sales by arming your producers with timely insights through AI and analytics to retain customers, manage renewals, and grow the business.

"*This CRM application allows us to visit other customers because we can find them using the 'find nearby' function. Now, when we're out in the field, already 100 miles from home, we can see who else we have in the area in order to potentially conduct an impromptu visit. That's going to be a huge productivity savings and a big touchpoint for us in the very near future.*"

Janice Nicolosi, Loss Prevention Manager at Lackawanna

How Engage for Insurance Helps Your Company

1   Producer Productivity

Increase productivity by giving producers access to customer information, data analysis and reporting, and activity management, whether on the desktop or through a smartphone or tablet.

Get a clear understanding of distributor performance including hit ratios, loss ratios, net promoter scores, agency surveys, and more.

Policyholders Experiences	AI-powered Assistant	Office Productivity	Producer Portal
Create targeted marketing campaigns through a 360-degree view of the policyholder that improves marketing and sales targeting.	Give producers and brokers AI-driven alerts on needed actions, sales leads, and quick access to client information.	Get alerts, renew policies, manage communications, communicate with customers, and view performance dashboards using familiar Microsoft Office tools.	Give brokers or agencies one portal to access the information and guidance they need, including self-help capabilities.

2　Distributor Relationship Management

Maximize the value of your agency relationships by engaging the right agency at the right time with planning tools, interaction journals, and an agent and broker portal.

Performance Management	Agency Enablement	Analytics and Reporting	Licensing Management
Get a clear understanding of distributor performance including hit ratios, loss ratios, net promoter scores, agency surveys, and more.	Maximize the value of your agency relationships by engaging the right agency at the right time with planning tools, interaction journals, and an agency portal.	Drill down into your business data and gain deeper insights into agency segmentation, policy management, and performance metrics of your products.	Manage agencies and agent licenses proactively with tools that include automatic alerts for license expiration and automated license management tasks.

3　Direct Channel Management

Give sales, marketing, and service people 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	Customer and Policy Lifecycle Management	Sales Management	Customer Management
Gain visibility into direct channel performance to better manage metrics like hit ratios, loss ratios, and customer satisfaction.	Manage the customer and policy lifecycle from prospect to issuance to renewal.	Transform sales with streamlined management of leads and prospects by territory and product line.	Gain a 360-degree view of policyholders and their policies to provide superior customer experiences.

4 Risk Management and Automation

Automate and organize risk assessment and other processes, including customer surveys, policy creation, underwriting, claims handling, and loss prevention.

Simplify Policy Underwriting	Accelerate Claims Handling	Modernize Core Insurance Operations	Workflow Automation
Automate and manage application and policy processing with easy-to-use quote management, underwriting rules, and risk assessment.	Process and evaluate claims with workflows and intelligent decision support to reduce costs, speed up decisions, and reduce fraud.	Automate the underwriting process to save costs and provide better, faster, and more accurate coverage decisions.	Streamline activities through auto-notifications for activities such as claims reviews, agency visits, and other activities that are critical to the insurance lifecycle.

Hitachi Solutions brings deep industry expertise, extensive experience, and high-value solutions that deliver rapid return on investment.

Contact Us

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