



Producer Workspace

Break the producer-underwriter wall

The insurance industry is going through a great phase of digital transformation. The growth of alternative channels has helped insurers up the ante' on expanding customer base. However, for the most part of it, the traditional channels, dominated by agents and brokers continue to be the top choice for majority of the insurance buyers. Hence, it's important for the insurers to provide a collaborative platform that makes it easy for producers, underwriters and other third-party stakeholders to build new business and service effectively.

Solution Overview

Producer Workspace is a Birlasoft solution focused on improving the way producers (brokers and agents) do business. It is the one stop shop where they can make submissions, view products, monitor performance and commission dashboards, and collaborate with underwriters. The solution also provides seamless producer on-boarding to make producer's lives easier.

Business Challenges

- Inability of the producers to access Online applications
- Lack of visibility into buyer's application cycle from lead generation to policy issuance
- Inability of the producers to track progress of their marketing campaigns
- The great wall between producer and underwriter that becomes a bottleneck for real time collaboration
- Absence of real time chat interfaces for insurance buyers

Key Features



Real time producer-underwriter connect: The solution's live chat feature helps producers instantly connect with underwriters at the touch of a button



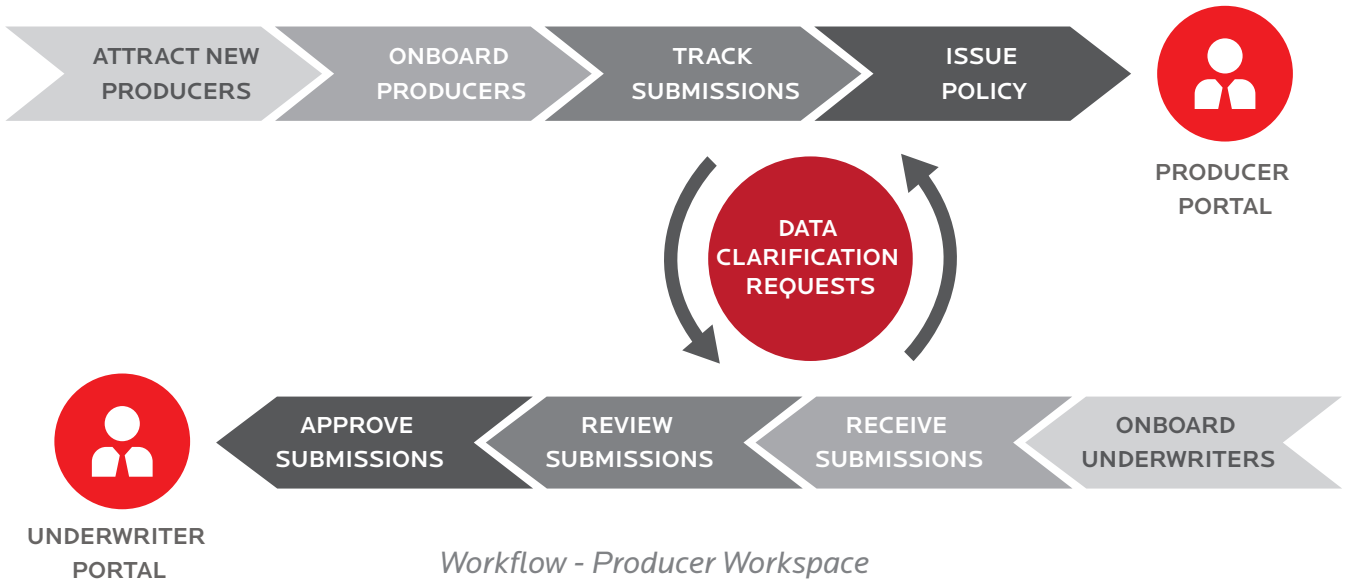
User friendly cross-device experience: The producer can access the platform from any device and yet not compromise on the user experience in terms of consistency and connectivity



Ease of use: The solution's interface is easy to navigate – it's as simple as booking a flight ticket



Easy integration with existing systems: Producer workspace can be easily integrated with existing policy administration system to leverage existing policy and submission related data

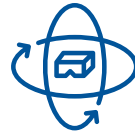


Key Benefits



Faster business growth

Producer and underwriters can collaborate on real time basis that leads to quicker communication and faster closures and high business volume



Top notch consumer experience

With a 360 degree view of the products, plans and policies, brokers are better prepared to resolve customer queries and grievances

The screenshot displays the Birlasoft Producer Workspace dashboard. Key features include:

- Dashboard:** Overview of key metrics: Submissions Under Review (3), Quote Generated (4), and Quote Expiring (7 Days) (1).
- My Active Submissions:** A table listing active submissions with columns for Client, Underwriter, Product, and Status.
- Recent Customers:** A list of recent customers with their names, IDs, and contact information.
- Submission Table:** A detailed table of submissions with columns for Submission #, Client, Underwriter, Product Name, Status, Submission Date, and Risk C.

Submission #	Client	Underwriter	Product Name	Status	Submission Date	Risk C
040418122002	C070417043244	oliveruh	Aerospace	Quote Issued	26-Apr-2018	4000
040418124316	C070417030346	johnu	General Liability	Quote Issued	04-Apr-2018	4000
230318044316	C260218025534	oliveruh	Commercial Auto Liability	Quote Issued	23-Mar-2018	4000
030418122128	C080218032227	johnu	Commercial Auto Liability	Quote Issued	03-Apr-2018	4000

Snapshot - Producer Workspace



RESOURCES

insurance@birlasoft.com | birlasoft.com

Enterprise to the Power of Digital™

Birlasoft combines the power of domain, enterprise and digital technologies to reimagine business processes for customers and their ecosystem. Its consultative and design thinking approach makes societies more productive by helping customers run businesses. As part of the multibillion-dollar diversified The CK Birla Group, Birlasoft with its 10,000 engineers, is committed to continuing our 158-year heritage of building sustainable communities.