



SALES

 **policy**sense
Insurance Solutions

SALES

Increase your sales, reduce your costs and minimize the risks in your sales and marketing processes.

Policysense Ventas is a solution designed for insurers who want to increase their sales through the use of next-generation digital capabilities. It supports sales through different means:

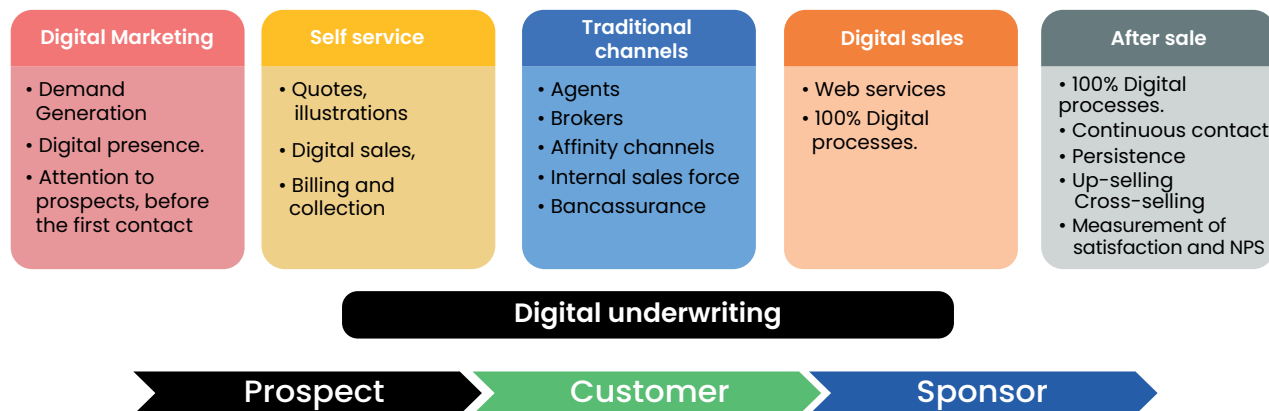
- Traditional channels
- Direct to consumer
- Through APIs
- Through third-party platforms
- A combination of all of these.

It encompasses various functions such as application management, quotation generation, underwriting, opportunity tracking, and marketing campaign management. It is suitable for selling both individual and group policies, including life, property and casualty, and health insurance.

Policysense has the ability to configure and price any insurance product through its kernel, allowing it to be offered self-service to customers and channels, as well as dedicated sales employees. This guarantees the monitoring of each sales opportunity, from its detection to its conversion, and conflicts between channels are avoided.

Supervision teams can easily monitor and support the entire operation, optimizing the service to the end customer. Speed and quality are essential in the sales process, and are the main objectives of this solution.

Objetivo: optimizar las ventas



Opportunity Management

Every business opportunity is carefully managed to ensure optimal results and excellent customer service.



With **Polycysense Sales** you can handle all kinds of opportunities, such as new prospects, current customers with cross-selling and up-selling potential, lost customers, referrals, etc.

1. Account Assignment Management

It can be an agent, broker, an employee. Even in self-service opportunities, someone should be assigned to follow up.

2. Scoring

Polycysense Sales can maintain several different scores to indicate the likelihood of the lead to buy, the fit of the lead in the target market and of course, the assurance of risk quality.

3. Work Plan

Manual and automated activities can be included in the plan for the business opportunity. Supervisors can be warned about certain events.

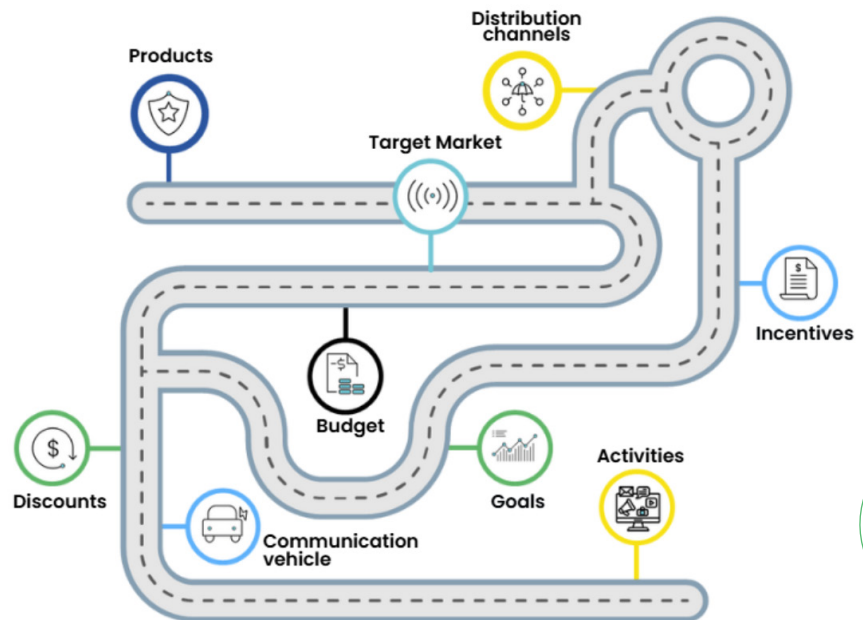
4. Omnichannel communication

SMS, chat, phone calls, portal activities. Everything will feed into the opportunity dashboard.

Marketing Campaigns: They can be designed and integrated into your CRM

Definition of a marketing campaign

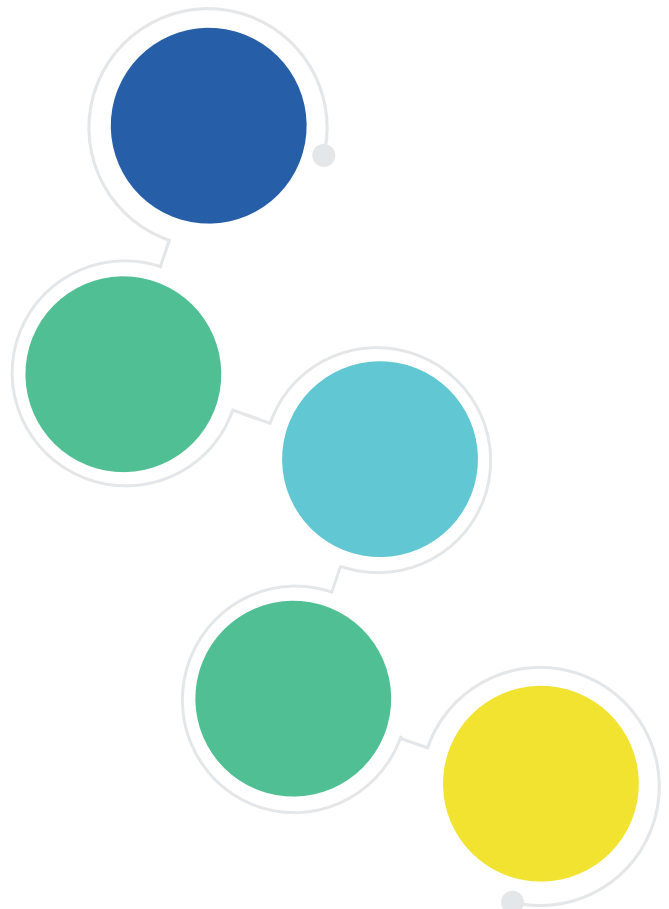
Polycysense allows you to define and track marketing campaigns. Businesses closed as part of the campaign may receive special discounts or generate different incentives for the distribution channels involved.



Our trading framework

Polycysense Sales is designed to work within a comprehensive commercial framework, which combines different external digital marketing tools and other disciplines, with teamwork focused on results, channel support, and agile follow-up of each opportunity. It is designed to adapt to your business processes.

- 1 Connect and communicate:** Find the differentiating message for the type of customer you want. Use SEO, marketing campaigns, portals, agents, etc.
- 2 Obtain information:** Use CRM, analytics, and tools that generate digital assets from this information.
- 3 Cultivate:** If the business does not close immediately, maintain permanent contact until it is done.
- 4 Convert:** The onboarding process is critical. It is the perfect time to surprise with something that delights the customer.
- 5 From client to promoter:**
 - Measure satisfaction (NPS).
 - Grow through cross-selling and up-selling.
 - Convert the client into our best promoter thanks to excellent service and interaction experience.



Some useful tools to improve sales efficiency:

It's not just about tracking customer potential, but to enable the user to convert the offers.

- **Requests and quotes**
 - » The user can send them at will to the prospect.
- **Configuration and loading of groups**
 - » An advanced user can adapt the product to fit the customer requirements and can upload group data
- **Illustrations and heritage management**
 - » Very useful for Life insurance.
- **Premium calculator**
 - » Allows for simple or complex premium calculations with minimal input data.
- **Discounts**
 - » It is possible to handle special discounts when the opportunity justifies it.

Supported Lines of Business in Polycysense



Life



Property & Casualty



Health

Impact to your Business:

Maximize customer retention and acquisition. Enable full online sales, increase the productivity of sales channels, and extract intelligence from the data. Among other benefits, it improves customer satisfaction levels and reduces the cost of acquisition

Next generation solutions for insurance companies

About us: We are In Motion, with 30 years of experience implementing Core Insurance systems in more than 20 countries and together with our R&D team, we are your ally in digital transformation for the insurance industry.



powered by  **in motion**



www.policysense.com

Sales and opportunity management:

Polycysense manages the quotes and sales, providing a pleasant experience in the interaction with the client until the final sale, as applicable in each type of product. In the case of subscription, interactions may apply for automatic or delegated approvals with exchange of requirements in workflows, use of technical and commercial scoring, as well as sales through APIs.

Key functionality



The administrator user can define the steps that will be followed to close each deal, including the expected times for each step. In some of these steps, the system automatically generates a score to prioritize opportunities, as well as generate application forms, quotes, and other supporting documents, essential in empowering the sales force.

Polycysense Sales: 100% digital, cloud-native, based on microservices end events, developed on Mendix low-code, and ready to integrate with any existing Core system.