VeriTouch
Insurance CRM Solution

Microsoft Dynamics 365

Certified

Architecture

USERS & PARTNERS

- CONTACT CENTER
- AGENCY
- TELE-SALES DIRECT-SALES
- OPERATIONS
- RISK
- BUSINESS EXCELLENCE

Pension Funds	Know Your Customers	Sales Force Management	Marketing & Campaign Management
	Contact Center Automation	Contact & Account Management	360 Single View of Customer
Life Insurance	Broker Relationship Management	Service Request & Complaint Management	Prospect Management
	Loyalty Management	Claim Management	Master Data Management
Core Insurance Products	Quote & Proposal Management	Social Media Intergration	Online Selling

Distribution Channels

- ONLINE
- TABLET
- MOBILE
- SMS
- BRANCH & AGENCY
- XML OTHER SERVICES
- SOCIAL

VERiPARK

Single View of Customer

360 degree customer view provides a consolidated view of all customer products, channel interactions, claims, offers and existing opportunities. The single view provides a set of visual icons to represent various flags of related to the customer such as if the customer is delinquent, is blacklisted or has an expiring policy or not.

360 view allows to capture customer interactions every time and display the interactions in a timeline.
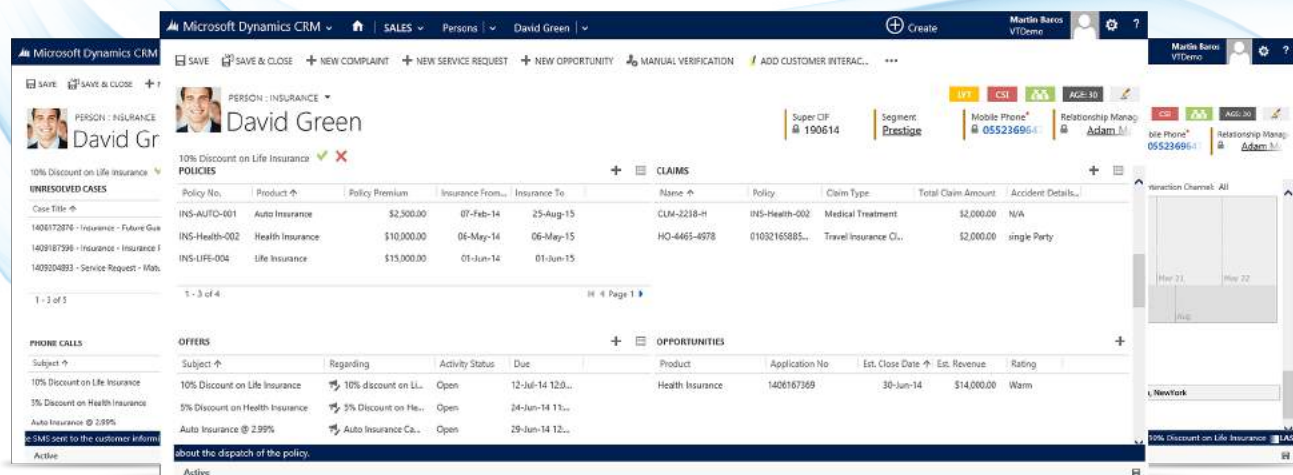
Single View of Broker

This view provides the basic information about the broker with some additional info on the relationship. Such as broker's segmentation, his targets and actuals, contact persons for the broker and all interaction history. This view shows the portfolio of the broker in various drill down charts.

Contact Center Automation

VeriTouch provides a complete agent desktop solution by providing the following features.

- Unified agent desktop provides one window solution for inquiries, maintenance and financial transactions
- IVR / CTI integration by popping up 360 view of the incoming caller
- Complaints and claims capture
- Lead capture and assignment to branch and direct sales agent channel
- Knowledge base
- Customer interaction capture as a call disposition

📊 Sales Management

Sales management module automates full sales cycle from prospecting to closure. Management can have complete visibility of sales pipeline. Sales management module provides the following features:

- Prospect capturing, eligibility check, assignment and conversion
- Opportunity capture, automatic assignment and routing
- Multi-channel sales process from agent network to branches to brokers
- Service Level Agreements (SLA) for opportunities
- Configuration driven sales process development for any product
- Escalations of opportunities with breached SLA
- Sales pipeline dashboard and reports
- Inbound and outbound sales processes
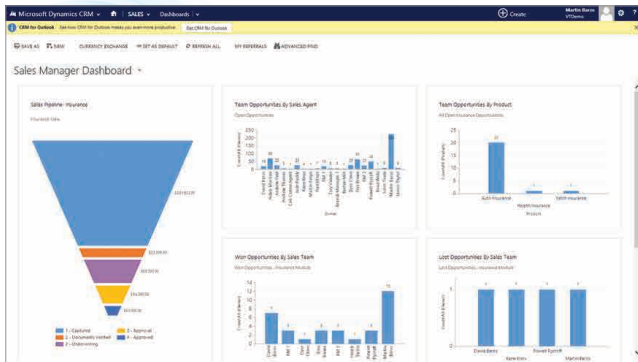
✨ Marketing Automation

VeriTouch provides a complete marketing automation for financial institutions by providing complete cycle of campaign preparation, launching, execution and distribution. VeriTouch offers the following features for marketing automation:

- Campaign creation, budget tracking and execution
- Target list preparation by customer segmentation
- Activity distribution such as phone calls, e-mails, SMS, etc
- Scripting support to have personalized dialogs
- Campaign dashboard to monitor the campaign real-time such as leads contacted and converted
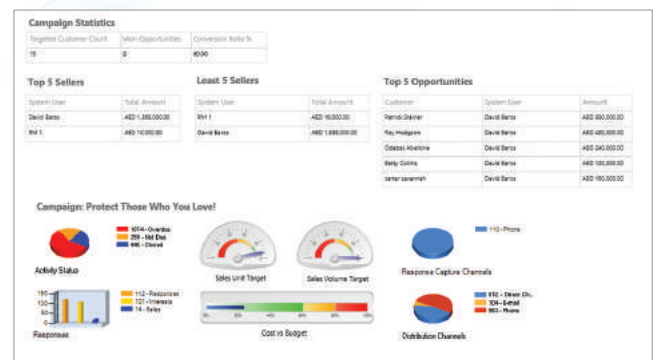
💬 Complaints Management

VeriTouch allows an insurer to offer operational excellence by providing automated workflows for complaints. Once a complaint is captured it is automatically routed to back office queues for fulfillment. Complaints module offers the following features:

- Complaint and service request capture with structured entry of details
- Automatic routing and assignment of cases by subject
- Segment and channel driven Service Level Agreements (SLA)s
- Escalation of cases after SLA breach
- Configuration driven case process configurator
- Case dashboard and reports
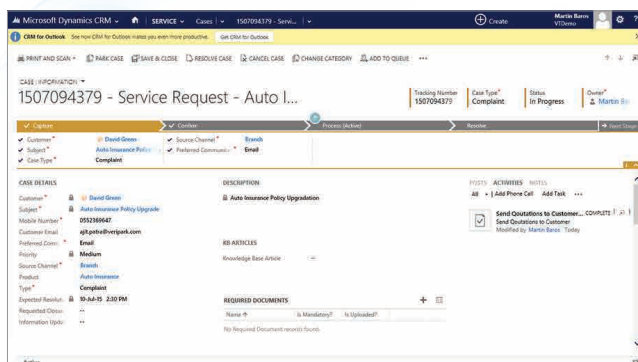
⭐ Key Features

Single View of Customer
- Customer products
- Customer profile
- All open complaints and service requests
- Offers & campaigns
- Ongoing applications
- Customer interaction capture and display

Single View of Broker
- Broker's portfolio
- Premium targets & actuals
- Commissions
- Interaction timeline
- Contact persons

Sales Management
- Prospect capture and assignment
- Opportunity capture and assignment
- Structured opportunity capture
- Sales process configurator
- Tele-sales / Direct sales queues
- Sales performance reporting

Marketing Automation
- Campaign management
- Campaign activity management
- Campaign dashboard
- Target Market List (TML) Management
- Phone, SMS, e-mail, web site banner, etc.

Complaints Management
- Structured complaints and SR capture
- Segment driven SLA
- N level escalations
- Automatic routing and assignment
- Case process configurator
- Case dashboard

Contact Center
- IVR based authentication
- 360 degree customer view popup
- Tele-marketing
- Disposition / wrap up codes
- Unified agent desktop with single sign on

Admin Module
- Role and access management
- Approvals and referrals
- Queues and escalations
- Centralized auditing logs

Customer Retention
- Schedule regular meetings
- Account Planning
- Generate follow up tasks
- Create, design and assign surveys

Master Data Mgmt
- Individual & Corporate customer profile
- Customer information update
- New customer enrollment
- Customer account opening

About VeriPark

Since being founded in 1998 VeriPark has gone on to become a leading global software company enabling financial institutions to deliver world class customer journeys in digital and assisted channels.

VeriPark's digital innovations and consultancy services are transforming business worldwide for banks, credit unions, insurance companies, pension funds, brokerage and wealth and investment firms. Operating in many countries worldwide, VeriPark has its main offices in the UK, Europe and the Middle-East. VeriPark works collaboratively with clients to develop innovative technology strategies and solutions that address their specific business challenges and bring the promise of digital transformation to life.

VeriPark finance sector solution offerings

VeriChannel
Omni-Channel Experience
- Internet Banking
- Mobile Banking
- Contact Center Banking
- Mobile Wallet
- Digital Onboarding
- Branchless Banking
- Chat Bot

VeriBranch
Branch Automation
- Teller
- Seller
- Advisor
- Branch of Future
- Unified Front End
- Digital Branch
- Signature Verification

VeriTouch
Acquisition, Retention, Cross Sell
- 360° / 720° Views
- Next Best Action
- Customer Insights
- Marketing & Campaign
- Management
- Loyalty & Retention
- Complaints & Service Request
- Management
- New Customer Enrolment

VeriLoan
Loan Origination & Servicing
- Retail Auto Loans
- Retail Personal Loan
- Retail Mortgage
- Retail Credit Cards
- Corporate Credit
- Proposal
- Scoring
- Deviations & Approvals

2016/2017 Global
Microsoft Dynamics
ISV of the Year