symbiosys

Sales Illustration
as-a-Service

Generate Sales Illustration for Life, Health, Annuity and Pension products digitally using either mobile devices in disconnected mode or over a web. It supports customer collaboration to manage sales process without in-person meeting.

C2LBIZ
CONCEPT TO LIVE

Reinventing Insurance Distribution.
Transformation Assured.

QUICK FACTS

300+	**150K+**	**01 - 03**	**1000+**	**500+**
Concurrent User Support	Peak volume of Sales Illustrations in a month	Weeks for New Product launch	Riders Configured	Plans Configured

BUSINESS CHALLENGES

- Long time to market to launch complex products
- Availability of tool on diverse platforms
- Ability to meet demands of distribution partners in short time
- Timely adherence of regulatory compliance

BUSINESS DRIVERS

- Quick launch of new Products with variations for different channels / partners
- Ability to generate Sales Illustrations on a Mobile device in a disconnected mode
- Ease of partner branding and integration
- Tools to engage with customer for consultative and collaborative selling
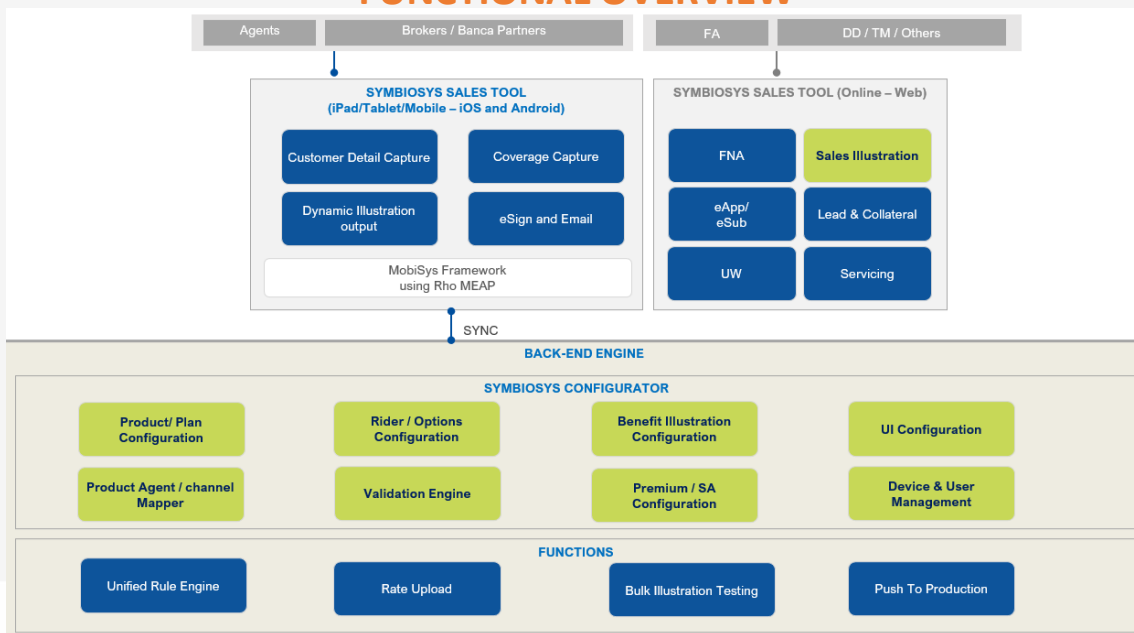
HIGHLY CONFIGURABLE SERVICE

PROVEN EXPERIENCE

CLOUD READY ARCHITECTURE

PAY-AS-YOU-GO ENGAGEMENT

FUNCTIONAL OVERVIEW

| Agents | Brokers / Banca Partners | | FA | DD / TM / Others |

SYMBIOSYS SALES TOOL
(iPad/Tablet/Mobile – iOS and Android)
- Customer Detail Capture
- Coverage Capture
- Dynamic Illustration output
- eSign and Email
- MobiSys Framework using Rho MEAP

SYMBIOSYS SALES TOOL (Online – Web)
- FNA
- Sales Illustration
- eApp/ eSub
- Lead & Collateral
- UW
- Servicing

SYNC

BACK-END ENGINE

SYMBIOSYS CONFIGURATOR
- Product/ Plan Configuration
- Rider / Options Configuration
- Benefit Illustration Configuration
- UI Configuration
- Product Agent / channel Mapper
- Validation Engine
- Premium / SA Configuration
- Device & User Management

FUNCTIONS
- Unified Rule Engine
- Rate Upload
- Bulk Illustration Testing
- Push To Production

KEY FEATURES

- Flexible product configurator and Illustration modeler for Life, Annuity, Pension, Health products and Riders
- Configuration driven UI and sales illustration outputs with graphs on philosophy of no code
- Ability to generate sales illustration on mobile app in disconnected mode
- Solvers for effective customer engagement to choose a product to map life events with right coverage
- Ability to apply rule based standard loading
- Automated Regression testing tool for quick launch
- Supports multi-lingual user interface and outputs

SERVICE BENEFITS

- Significant reduction in time and cost to launch new product
- Ease of managing demands of distribution partners
- Improve distributor and customer experience
- Drive competitive advantage thru quick and innovative product launch

OTHER COMPLEMENTARY SYMBIOSYS SERVICES

- *Product Configurator*
  as-a-Service
- *In-force Illustration*
  as-a-Service
- *e-Application*
  as-a-Service

- *Underwriting*
  as-a-Service
- *Auto-Underwriting*
  as-a-Service
- *Sales Tool*
  as-a-Service

4	10	30%	300+	400+	40+	9 of 30	100+	12+	12
Multi-Country Implementations	Solutions	CAGR Over Past 5 Years	Professionals	Years of Core Team Experience	Clients	Global Top Insurers	Implementations	Years	Countries

Global Alliance with LIMRA · XCELENT Technology 2013 Award Winner · CIO Review 20 Most Promising INSURANCE TECHNOLOGY Solution Providers 2017 · CIOReviewIndia 20 MOST PROMISING SALES TECH SOLUTION PROVIDERS 2019

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