



DIGITAL SELLING EXPERIENCE FOR FINANCIAL SERVICE ORGANIZATIONS

Convert Early Leads to Wins

Microsoft
Partner



2021 Partner of the Year Winner
Financial Services Award
Global SI Digital Transformation Award
Analytics Award

Capgemini | www.capgemini.com | microsoft.fs@capgemini.com





INDUSTRY: FINANCIAL SERVICES

Capgemini's Digital Selling Experience solution is designed to help financial service organizations augment their sales platform providing the necessary tools to their agents & advisors enabling omnichannel experience for potential new customers. This B2C solution helps businesses with rapid prototyping to enable digital channels to engage with new customers, using Microsoft's low-code/no-code technologies.

CHALLENGES

- Many Insurance agents and financial advisors lack the digital channels to engage with new customers effectively
- Institutes don't have the ability to provide their agents personalized, AI-driven chatbot
- Customers prefer high-touch experience from the comfort of their homes
- Typical CRM and Omnichannel solutions are expensive and/or require extensive customizations

IDEAL SOLUTION

- A simple solution which offers Voice, Video, Screenshare, and Chatbot capabilities
- A low-code/no-code solution which can be easily customized and rapidly deployed
- Agent experience is delivered via Microsoft Teams, which is implemented in most organizations

DESIRED OUTCOMES

- Our solution helps insurance agents and financial advisors provide a modern, yet personalized experience, virtually.
- With the omnichannel experience, time to value is significantly reduced.
- Organizations are not spending a lot of time and money on custom development and maintenance.





DIGITAL SELLING EXPERIENCE FOR FINANCIAL SERVICES

Empowering Insurance Agents and Financial Advisors to Provide Digital Experience to Their Customers

1

Built on Microsoft Azure Cloud Services

- Leverages industry leading Azure Bot framework
- Customer and Agent/Advisor experience is available via Web Client or several other channels
- Seamless B2C integration
- Completely customizable and modular

2

Low Cost

- Low-code/no-code means minimal development and maintenance cost
- While integrations with MS Teams, Omnichannel, and Power Platform are available, they're optional and such licenses are not mandatory
- No vendor lock-in or third-party licenses required*

3

Secure and Compliant

- Deploy the solution in your Azure subscription
- Chat conversations can be retained as per privacy laws and regulatory compliance
- Customers leveraging MS Teams can record audio/video calls for compliance and training purposes





WHAT DOES DIGITAL SELLING EXPERIENCE MEAN FOR YOUR BUSINESS

Let the Virtual Assistant Do the Work for You!



Bots can Look up Agent/Advisor Calendar and book an in-person or virtual appointment with customer



Customers can get answers to FAQs using Multi-turn Conversational AI



Provide human-like conversational experience using Language Understanding (LUIS) and Sentiment Analysis



Get notified on new sales leads on Teams Channel, Email, or other channels



Trigger Teams App or a workflow, update CRM, call an API, Invoke another Bot and much more!

How Can Agents/Advisors Create Value for Customers?



Using screenshare, guide customer to pick the best insurance policy, investment option, or show them how the bundle option can save them money



Provide facetime to customers virtually, save them the trip, improve customer satisfaction and increase the win rate!



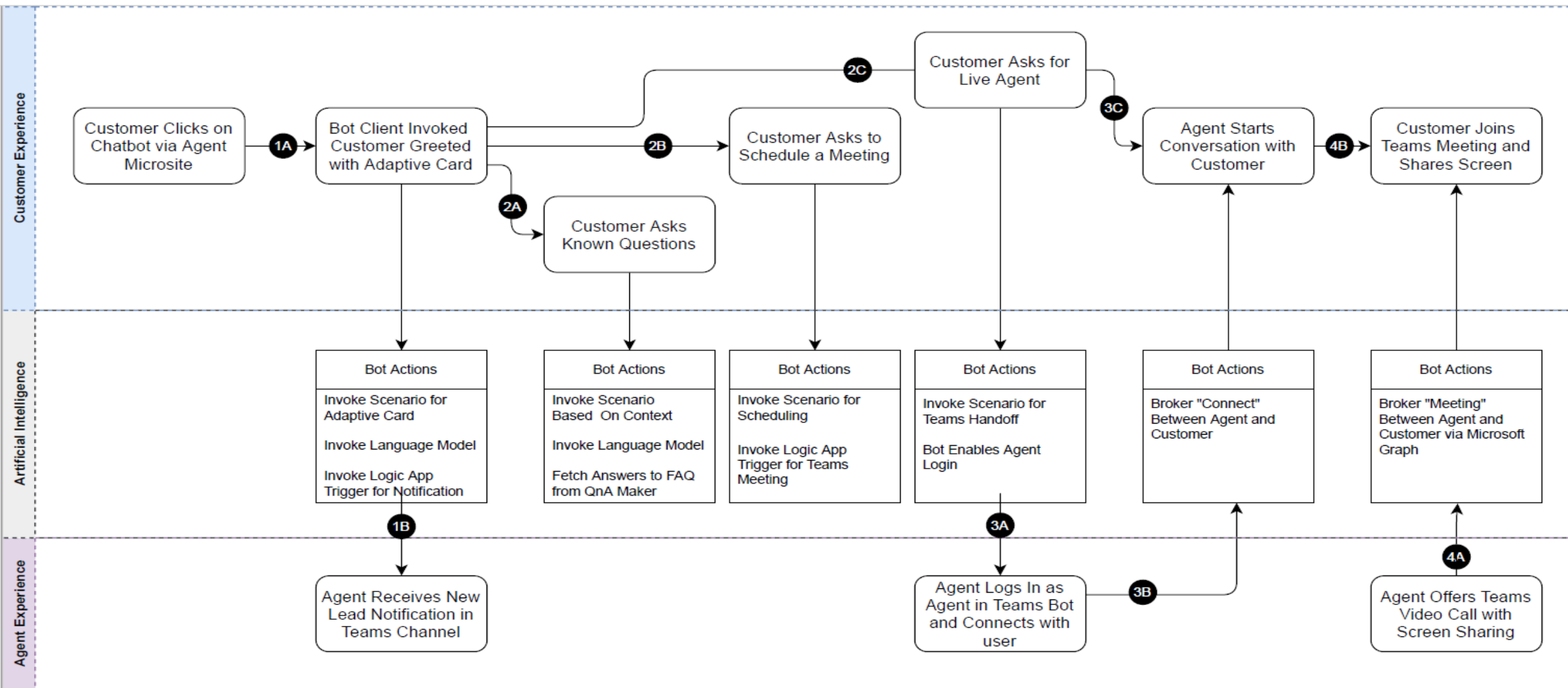
Include additional experts to the voice/video call to provide expert advise or instantly resolve customer concerns



Increase the reach to customers by publishing your bot on Facebook, WhatsApp, Alexa, Skype and several other channels





EXAMPLE JOURNEY MAP FOR CUSTOMER AND INSURANCE AGENT – POWERED BY AI





CUSTOMER EXPERIENCE SCREENSHOTS

 **Your Local Capgemini Insurance Agent**

 **Steve Smith**
Since 2002

Hi! My name is Steve Smith, and I look forward to working with the Greater Austin community to help meet policyholders' insurance needs

Agency Name: Capgemini Insurance
Address: 2300 Business Ave Austin, TX 78224
Phone: 512-123-4567
Email: stevesmith@capginsurance.com


[Schedule A Meeting](#)


[Get Started with Auto or Home Insurance Quote](#)

[Visit My Website](#)

How can I help?


Just now


Natural Language Processing in action → office hrs  10 minutes ago

 Here are my office hours along with the office address and contact information:

Agency Capgemini Insurance
Address: 2300 Business Ave, Austin, TX 78224
Office Hours M-F - 9:00AM - 6:00 PM
Phone: 512-123-4567
Email: stevesmith@capginsurance.com



10 minutes ago

LUIS - Intent recognition → i have a very specific question  9 minutes ago

 Sure, would you like to have a call now to discuss this in detail?

9 minutes ago

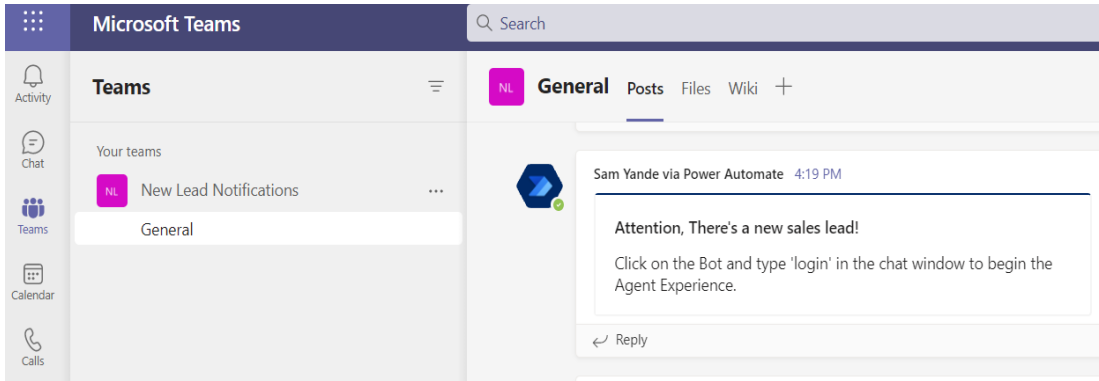
[Yes](#) [No](#)

 |Type your message 

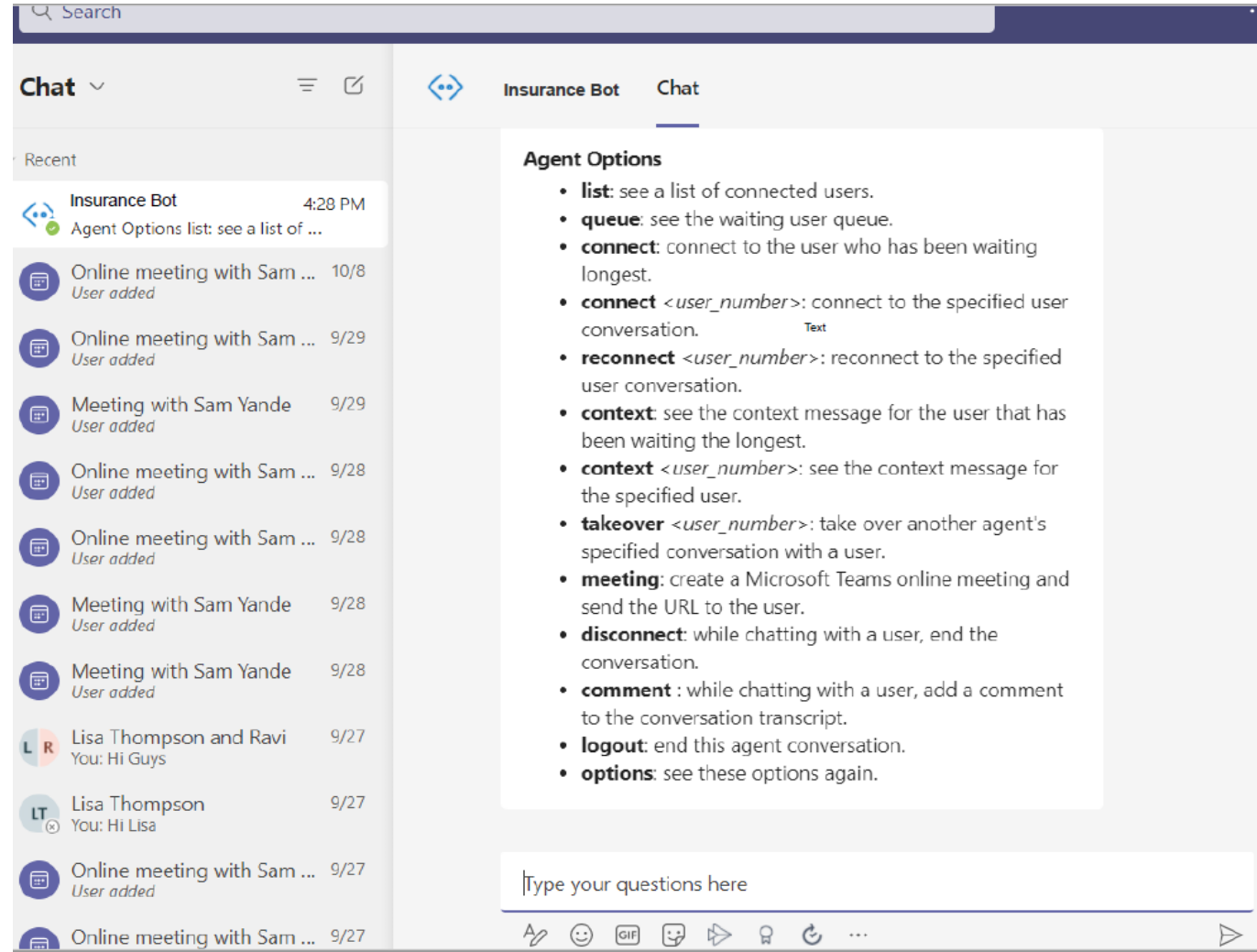


AGENT EXPERIENCE SCREENSHOTS

Teams Notification as soon as customer clicks on Chatbot

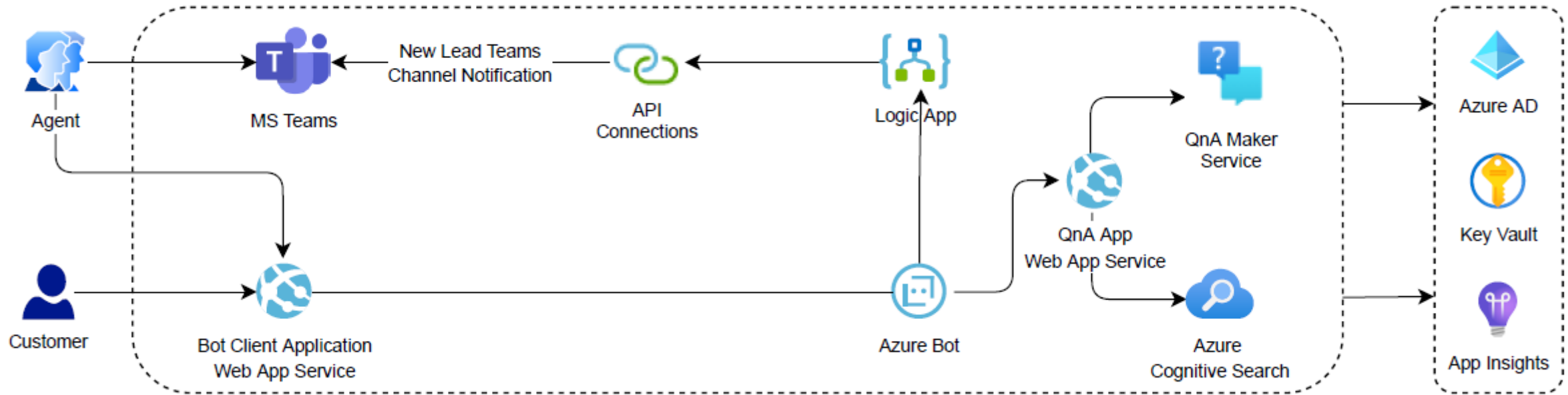


Commands for Agent to take over bot and have live conversation with customer



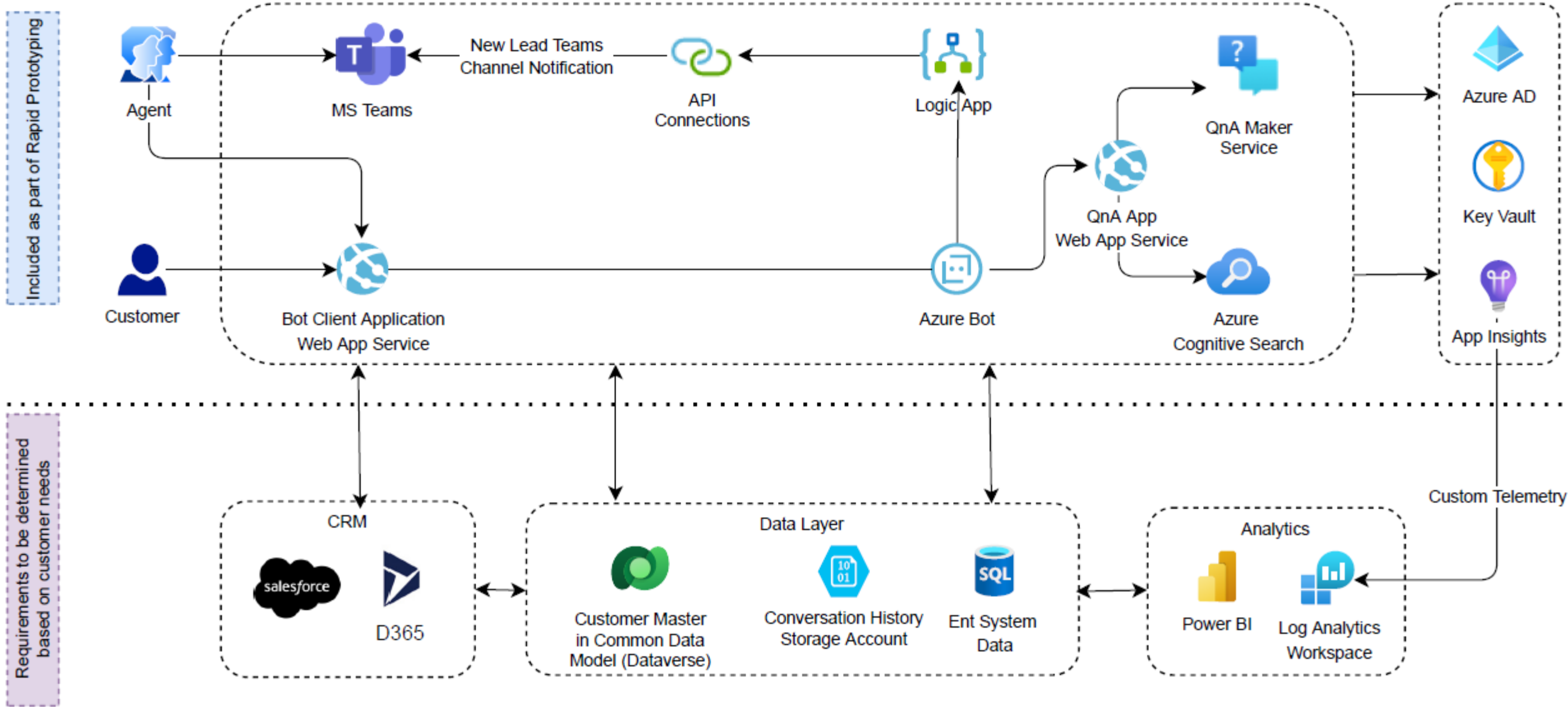


AZURE ARCHITECTURE FOR THE ILLUSTRATED JOURNEY MAP





SOLUTION ARCHITECTURE WITH ENTERPRISE INTEGRATIONS





6-WEEK RAPID PROTOTYPING ENGAGEMENT MODEL



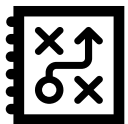
PLANNING – 1 Week

- Engage with key stakeholders
- Define scope and success criteria
- Assess Environment Readiness



SOLUTION DEVELOPEMNT AND IMPLEMENTATION– 4 Weeks

- Deploy Azure Bot and other Azure Services
- Configure Language Models
- Configure Out of the Box and Custom Scenarios
- Make Chatbot Webapp available as iframe to be integrated in the agent/advisor portal
- Enable Microsoft Teams Integration
- Deploy Agent Experience



FEEDBACK & BACKLOG CREATION – 1 Week

- Demonstrate integrated Chatbot, Customer and Agent Experience, and Voice/Video/Screensharing capabilities
- Seek feedback from key stakeholders on the prototype
- Define high Level Epics for enterprise integrations and org-wide rollout
- Conclude prototype



CAPGEMINI DIGITAL SELLING EXPERIENCE FOR FINANCIAL SERVICE ORGANIZATIONS

Microsoft Partnership:

<https://www.capgemini.com/partner/microsoft/>

Contact us: microsoft.fs@capgemini.com

Learn more:

Link to your Microsoft Commercial Marketplace offer

Microsoft
Partner



Gold Cloud Platform
Gold Security
Gold DevOps
Gold Application Development
Gold Data Platform





About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of 270,000 team members in nearly 50 countries. With its strong 50 year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fuelled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2020 global revenues of €16 billion.

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