

# Individual insurance consultation via messenger

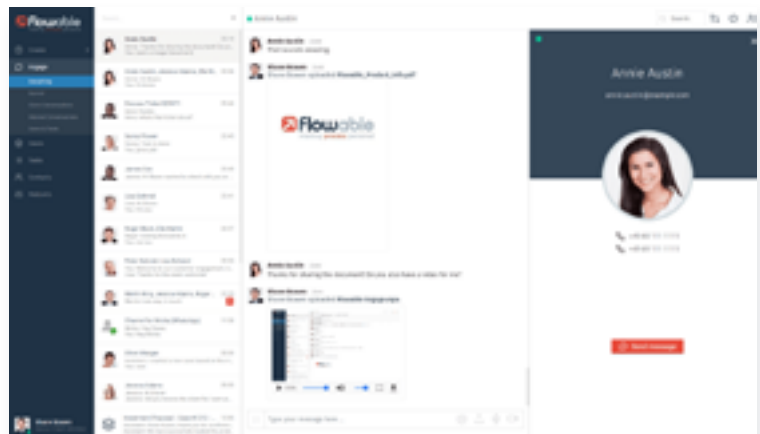
smart, secure, safe

**How can premiums be adjusted? Which insurance will be best through the crisis? Many of your customers are currently asking themselves these questions, combined with a greater need for advice on the insurance side. In order to be a reliable partner in times of crisis, personal communication and being easily reachable is crucial.**

By integrating a messenger into your infrastructure with Flowable, you can reach customers directly and personally. Whether it's a matter of collecting data, providing information or accepting orders, Flowable Engage retains all messages and maintains integrity and legal certainty. This brings the customer closer even in times of social distancing.

**Successful consulting.** Inspire your customers right now with the best possible service and individual advice via messenger.

**Integrated communication.** Flowable Engage offers more than just an app. The integration of a messenger into your systems optimizes your service thanks to automation, compliance and documentation based on an integrated business process management platform.



## Today billions of people rely on messengers – Why not you?



Establish close customer relations and communicate personally via messenger



Ensure legal certainty and integrity through Flowable Engage as a secure interface



Can be implemented very quickly: always available for customers, even in times of crisis

## Flowable Engage offers an Omnichannel experience

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Flowable Engage is available for internal communication as well as for communication between bank and customer via their preferred messaging application. Documents, audio and video files can be exchanged. If necessary, other specialists can be called in to join the conversation.

### The functions at a glance

- ✓ Call management in personal dashboards
- ✓ Various chat possibilities
- ✓ Engaging experts in an open chat
- ✓ Conversational chats based on different channels such as WeChat, WhatsApp, etc.
- ✓ Context-based discussions as topic chats
- ✓ Automated guidance with digital support for standard processes and customer-specific procedures
- ✓ Standardized processes for chats along the customer journey



## Audit-proof logging and archiving

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The entire audit trail of communication is always available, including the conversation or correspondence itself. The documentation can be archived and is retained even if the advisor leaves the bank. The flexibility of the platform makes it possible to integrate archiving systems without much effort. The existing archiving processes can be used and adapted to the client's needs.

## Easy to implement, quickly available

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Flowable is easy to implement and can be up and running within a very short time. Why wait? With WhatsApp integration, you can make your customer communications personal, efficient and legally compliant. Contact us for a no-obligation web demo.