



# Insurance sales tool

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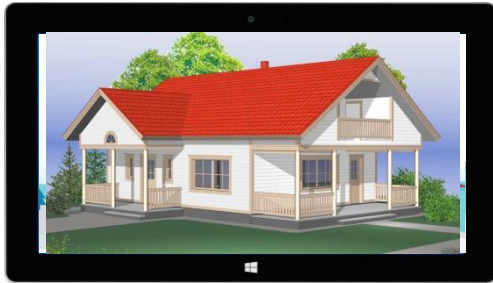
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- Client is currently using multiple tools that are used in sales, but they do not support mobility well
- The client has begun utilizing partner network in sales. Partner network sales force mostly operates in malls and events.
- Compared to a more traditional sales event, these client interactions need to be brief and to the point.
- Tablet has been chosen as the best user interface that can be used jointly with the customer when assessing the need for insurance
  - Emphasis on ease of use
  - Could also be used as a stand alone client facing user interface

Prio 1.

Home insurance



Collect minimum information to calculate an offer when customer has time

Prio 2.

Collecting sales leads



If customer is in a hurry, but is interested, collect quickly contact info and insurance needs

- Home
- Health
- Vehicles
- Life
- Infant
- Pets

Prio 3.

Customer loyalty program



If the customer already has insurance within the company, ask if the customer would like to join the loyalty program



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