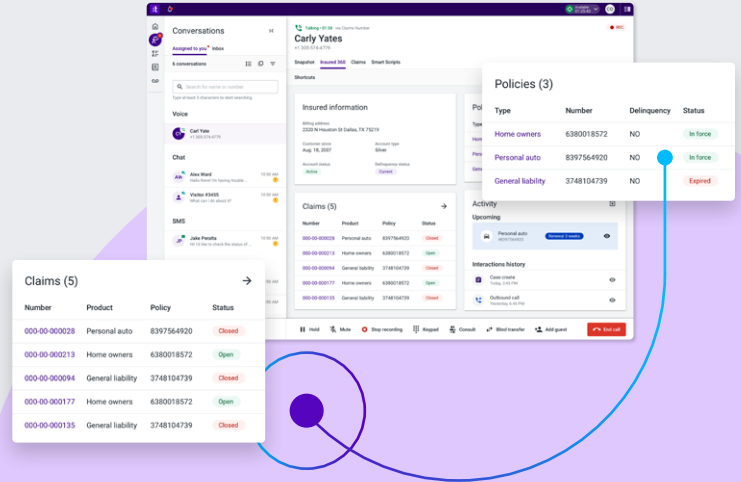


FINANCIAL SERVICES & INSURANCE

# Talkdesk Financial Services Experience Cloud™ for Insurance

Meet the end-to-end contact center solution purpose-built for insurance.



Increase customer loyalty



Improve employee retention



Increase business agility



Reduce operating costs

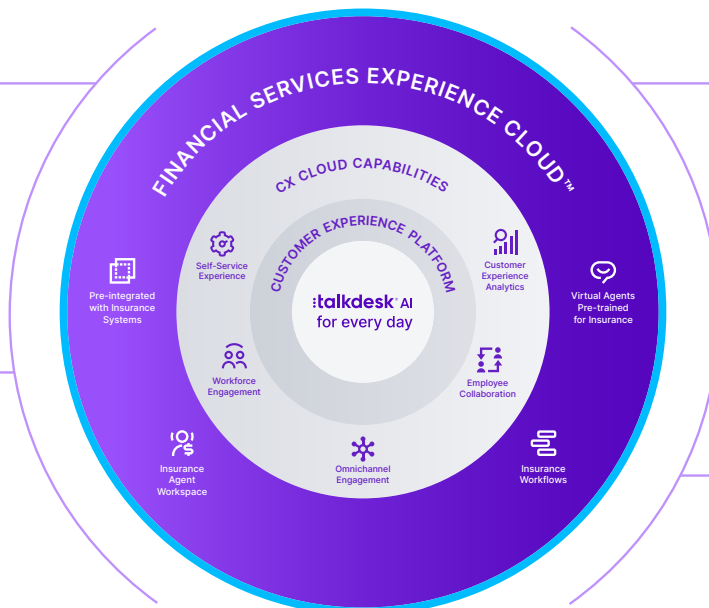
The insurance industry is at an inflection point with customer experience (CX). Insurers face tremendous pressure on growth and profitability spurred by industry consolidations, market volatility, cyber threats, new market entrants, climate change, and more. At the same time, customers are expecting more seamless, personalized, and digital-first experiences.

Talkdesk Financial Services Experience Cloud is the end-to-end CX solution purpose-built to unify the customer journey across policy servicing, claims, and new business. It comes pre-integrated with Claims Management Systems (CMS), Policy Administration Systems (PAS), and Customer Relationship Management (CRM) systems, pre-designed with customer-carrier workflows, and pre-trained with AI and insurance intent libraries that enable empathetic service.

## Key features

**CRM, CMS, and PAS integrations** connect vital client data including policy detail and claims history for a unified customer journey.

**Insurance agent workspace** surfaces customer policy information, claims history, previous interactions, and other customer context in a single, unified view for increased efficiency and speed to resolution.



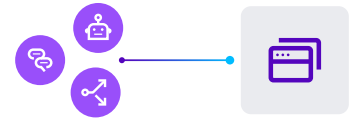
**Virtual agents for insurance** are conversational bots which autonomously solve customer issues with a human-like experience powered by AI that's pre-trained to understand insurance scenarios and handle them with empathy.

**Insurance workflows** leverage AI and integrations to streamline interactions and automate processes such as FNOL and policy changes.

# Capabilities

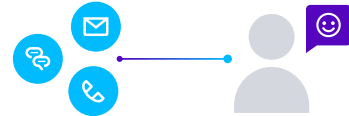
## Streamline policy servicing, claims, and new business.

Pre-built routing flows, bots, and agent scripts are integrated with CMS, PAS, and CRM systems to fulfill insurers' top priorities for customer experience.



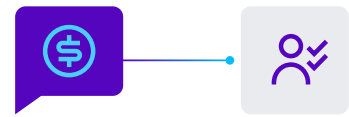
## Improve customer engagement and satisfaction.

Omnichannel communication through voice and digital channels enable bi-directional interactions that meet customer expectations.



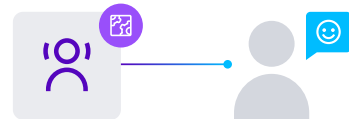
## Personalize automated interactions.

Conversational bots recognize insurance scenarios and use this information to accurately and empathetically help customers resolve their inquiries.



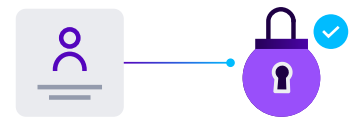
## Empower employees with actionable insights.

Financial Services Experience Cloud uses AI and integrations with your systems of record to proactively meet customer needs during interactions in real time.



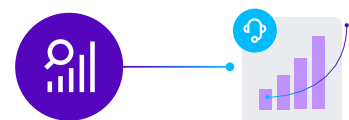
## Ensure compliance, enhance security, and protect customer data.

Pre-built scripts for agents, along with interaction recordings and a native compliance application, mitigate risks of negligence and fraud.

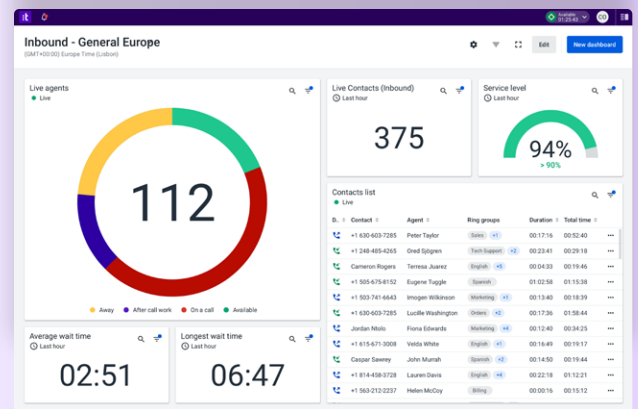


## Leverage data to improve performance and operations.

Dashboards and feedback empower your teams with metrics to track KPIs and surveys to capture, analyze, and act on insights. Gain the data needed to make informed decisions that lead to happier customers and increased loyalty.



# Talkdesk Financial Services Experience Cloud™ for Insurance



**Conversations**  
 Assigned to you: Inbox  
 6 conversations

**Carly Yates**  
 +1 305-574-4779  
 Snapshot: Insured 360, Claims, Smart Scripts

**Insured information**  
 Billing address: 2320 N Houston St Dallas, TX 75219  
 Customer since: Aug. 18, 2007  
 Account type: Silver  
 Account status: Active  
 Delinquency status: Current

**Policies (3)**

Type	Number	Status
Home owners	6380018572	NO In force
Personal auto	8397564920	NO In force
General liability	3748104739	NO Expired

**Claims (5)**

Number	Product	Policy	Status
000-00-000028	Personal auto	8397564920	Closed
000-00-000013	Home owners	6380018572	Open
000-00-000094	General liability	3748104739	Closed
000-00-000177	Home owners	6380018572	Open
000-00-000135	General liability	3748104739	Closed

**Activity**  
 Upcoming: Personal auto (8397564920) - Renewal 3 weeks  
 Interactions history: Case create (Today, 3:45 PM), Outbound call (Yesterday, 6:45 PM)

Report an accident

**1. Policy**  
 Select which is the car that was involved in the accident.

**Mercedes Benz**  
 Plate: #984730574610  
 Policy number: #037482718

**Peugeot 206**  
 Plate: #984730574610  
 Policy number: #037482718

