Insurance Solutions

NexJ Integrated Desktop for Insurance

NexJ helps customer-facing staff, including underwriters, agents, contact center reps, claims adjusters, and billing reps, better understand and serve prospects and customers. The NexJ Integrated Desktop for Insurance integrates contact, demographic, and policy information from across the enterprise in a unified view. It then marries this view with CRM functionality tailored to the insurance industry to improve the customer experience, drive revenues, and increase productivity.

The NexJ Integrated Desktop for Insurance integrates data sources, applications, and systems across all lines of business and channels into a single entry point, giving users a complete, real-time picture of the customer or prospect in any given channel. Best-of-breed functionality, including lead management, business process automation, mobile CRM, and collaboration tools enable teams to deliver superior service more efficiently than ever before.

Customer-facing staff can leverage the NexJ Integrated Desktop for Insurance to:

- Better service customers by leveraging all customer information including policies, claims, household relationships, and billings
- Save time and deliver better service through streamlined best practices and easy collaboration at every stage of the customer lifecycle
- Support customers efficiently in any channel the customer chooses with a real-time view of previous interactions and in-progress processes
- Grow premiums and revenue by maximizing the value of every lead to drive new business and by cross-selling to existing customers and households

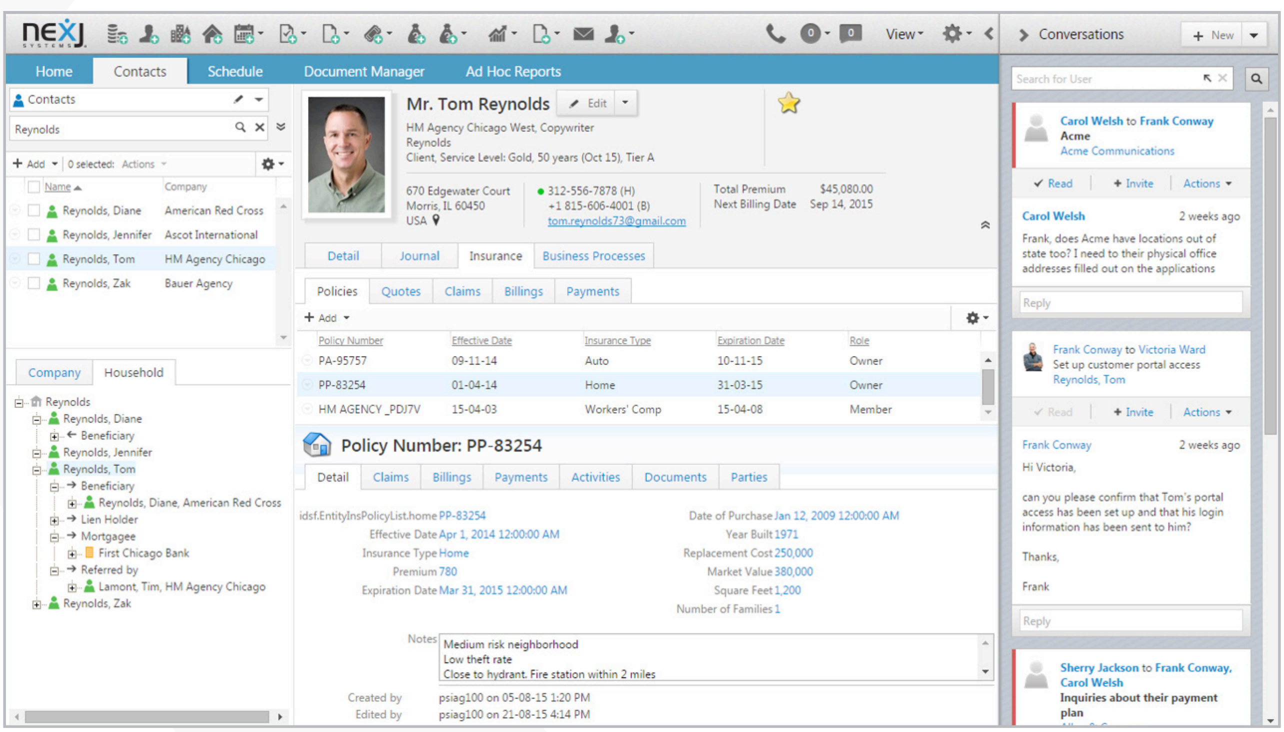
Key Benefits

Deliver all information about a customer to users in a single customer-centric application to better understand, sell to, and service customers

Provide quick access to the best-of-breed tools agents, brokers, and underwriters use most to service customers, with seamless context-passing between applications to ensure consistent and accurate use of data

Access key customer information on the road on smartphones and tablets

Maximize user adoption by enabling users to get exponentially more out of the system than they put in



Comprehensive Customer View

Customer-facing staff can leverage a unified profile that contains all information about the customer, interactions past and future, and all opportunities, policies, quotes, and claims at the individual or household level.

Contact Center

Contact center agents can deliver superior service and improve call resolution times using NexJ's comprehensive customer view and prebuilt functionality, including branching call flows, dynamic call scripts, configurable business rules, optimized screen pops with integration to CTI and softphone, and a blended view of service requests from all channels.

Relationship Modeling

Users can view contact and insurance ecosystem relationships in the Relationship Hierarchy. Agents, underwriters, and contact center reps can view a contact's personal and professional spheres of influence, as well as interactions, policies, and account information at the household or individual level, to better understand customer needs, drive referrals, and grow their books of business. They can also identify all team members servicing the client, including agents, service providers, and claims adjusters.

SmartForms and Workflow

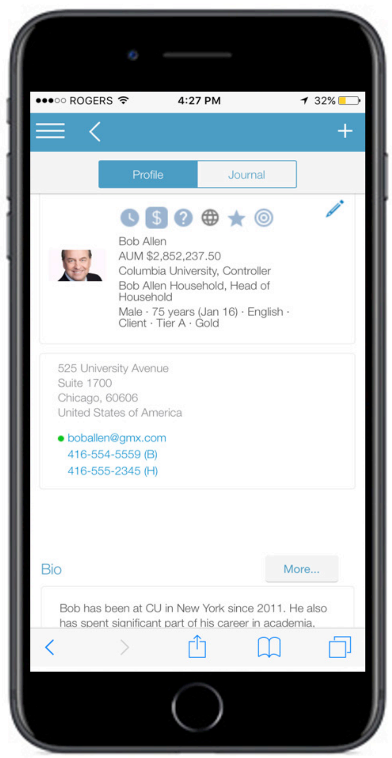
Firms can streamline and automate complex customer-centric business processes, such as applications, quoting, and new account opening, and integrate them with their existing systems and data stores. Dynamic, rule-driven forms are prefilled with existing data, agents are prompted to collect outstanding data, and data is validated and routed for speedy approval.

Powerful Lead, Campaign, and Opportunity Management

Teams can identify and work leads, prospects, and referrals from multiple sources, with all the information they need at their fingertips. NexJ intelligently distributes new leads to the appropriate people and automatically delegates the required tasks and scheduled items. Users can track campaign progress over time including the percentage of completed activities, the results by stage, and the resulting opportunities.

Microsoft Exchange Synchronization and Outlook Integration

NexJ CRM synchronizes Contact Data, Calendar items, and Tasks with Microsoft Outlook, and other Microsoft Exchange-enabled devices, such as iPhone, Android and BlackBerry. Users can access up-to-date schedule, task list, and contacts from a tablet or smartphone and save emails with attachments to the contact record and link them to any related events, campaigns, or opportunities.



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About NexJ Systems

NexJ provides enterprise customer management solutions to the financial services and insurance industries. Our solutions, which integrate information from multiple systems into a unified view, include industry-specific customer relationship management (CRM) to enable collaboration across countries, regions and teams; customer process management (CPM) for client onboarding with KYC and AML for regulatory compliance; and customer data analytics & intelligence (CDAi), which enables augmented intelligence to better understand, sell to, and service customers.