



OneConnect Financial
Technology Co., Ltd.

Digital Insurance Agent Solution

Boost agent productivity, generate new leads and grow your revenue faster with Digital Insurance Agent Solution. Powered by OneConnect's proprietary artificial intelligence (AI) technology, the Digital Insurance Agent Solution helps financial institutions to close more sales quickly, securely and seamlessly by analysing customer needs and enabling staff to work more effectively.

Key Features of Digital Insurance Agent Solution



Empowerment Solutions

- Agent productivity tools automate administrative tasks so agents can spend more time on customer acquisition
- Agent optimisation management tool allows managers to match leads to agents and provide agents with timely guidance and support
- 360° customer profiling & needs analysis integrates data and leads from multiple channels to provide agents with a holistic view of customer needs and preferences
- Product recommendation engine guides agents on suitable products for customers and boosts sales effectiveness



Training Solutions

- Self-directed learning in a mobile-friendly interface accessible anytime, anywhere
- Engaging AI-enabled delivery of courses through AI-partner role-play scenarios
- Robust multiple-scoring metrics that cover knowledge accuracy, delivery fluency and sentiment analysis
- Natural language capabilities analyse free-form speech responses for a more natural and relevant assessment



Recruitment Solutions

- Manager only needs to input candidate's details to activate application process
- Chatbot powered by AI guides candidates through each step of the application
- Biometric authentication and identity document (ID) verification incorporated as part of the application and screening process
- Remote interview and cognitive support analysis enable candidates to be assessed remotely with greater precision

Benefits



Increase agent productivity by streamlining the sales and approval processes, so agents spend less time on paperwork and repetitive tasks.



Ramp-up the performance of new agents more quickly to unlock their true potential in the shortest time possible.



Invest in the right individuals by profiling candidates to identify highly-motivated agents who fit the organisation.

Why choose Digital Insurance Agent Solution?



Strong support by Ping An Group

OneConnect is an associate company of Ping An Group - world's second-largest insurer by market value, and the 5th largest financial institution globally by market cap. Digital Insurance Agent Solution has supported 1.8 million agents under the Ping An Group, reduced manpower by up to 70%, increased productivity by 32%, and saved 310 million sheets of paper per year.



Advanced and proven technology

Ping An has invested over USD15 billion over the last decade in technology and devotes 1% of its billion-dollar revenue to research annually. OneConnect adopts the latest AI technologies from Ping An to deliver a comprehensive end-to-end solution that supports a high volume of agents, and achieves agent productivity three times higher than the industry average.



In-depth fintech experience beyond IT

OneConnect has proven success in replicating the "Finance + Technology" model by integrating technology with industry expertise and consulting services. After using the Digital Insurance Agent Solution, a leading life insurer was able to distribute products more effectively through its 10,000-strong agent network. The insurer acquired 40 million new customers through a new digital onboarding process, and reduced the time taken for new applications by as much as 80%.



**OneConnect Financial
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Data Protection & Privacy

OneConnect will work closely with you to ensure your firm stays compliant with applicable data protection and privacy laws throughout our engagement with you. We will take care to ensure we fulfil our obligations as a data intermediary to protect your data accordingly.

To find out how OneConnect Digital Insurance Agent Solution can help you stay ahead of your competition, visit www.ocft.com.sg or email us at PUB_YZTMARKETING@ocft.com.

