

INSURANCE

Deliver important insurance documents customers can always find

A practical guide to choosing the right approach for different insurance communications, from service messages and live policy information to important documents customers may need to keep for years.

A COMPLETE APPROACH TO CUSTOMER DOCUMENTS

Different documents do different jobs

Policy administration systems, email and messaging, customer portals and Documentd each serve a different purpose. The right choice depends on the job: creating and managing policy information, communicating with customers, providing access and interaction, or permanently delivering an important document to the recipient. Using each in the right way creates a better customer experience and reduces avoidable support queries.



INSURANCE IN PRACTICE

Choose the right approach for each communication

Portals are the right place for live policy information, claims progress and customer interaction. Email and messaging handle reminders and transient updates. Documentd is designed for important, point-in-time documents that customers may need to retain and find again long after they were issued. Using each appropriately gives customers a clearer, simpler experience and helps reduce avoidable support queries.

Email & messaging

COMMUNICATE

Best for short-lived information, reminders and prompts to take action.

- Renewal reminders
- Payment reminders
- Claims updates
- Service notifications

Customer portal

ACCESS & INTERACT

The right place for live information, self-service and ongoing interaction.

- Current policy information
- Claims status
- Account changes
- Quotes and transactions

Documentd

DELIVER & RETAIN

For important point-in-time documents customers should keep.

- Policy schedules
- Certificates of insurance
- Renewal documents
- Claims decisions
- Settlement documents

