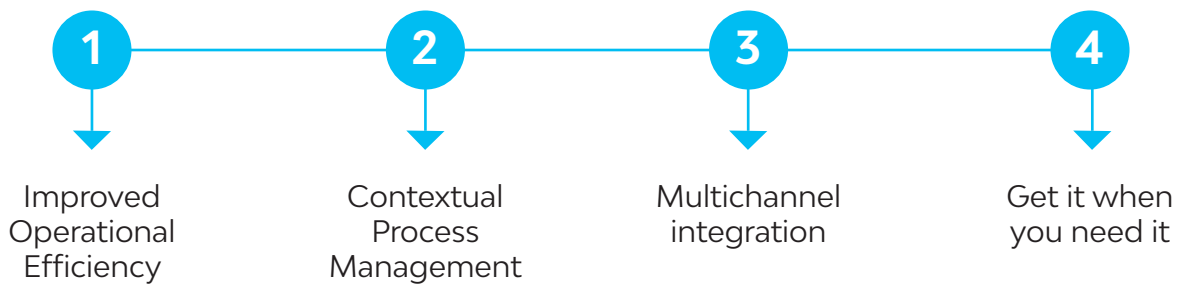
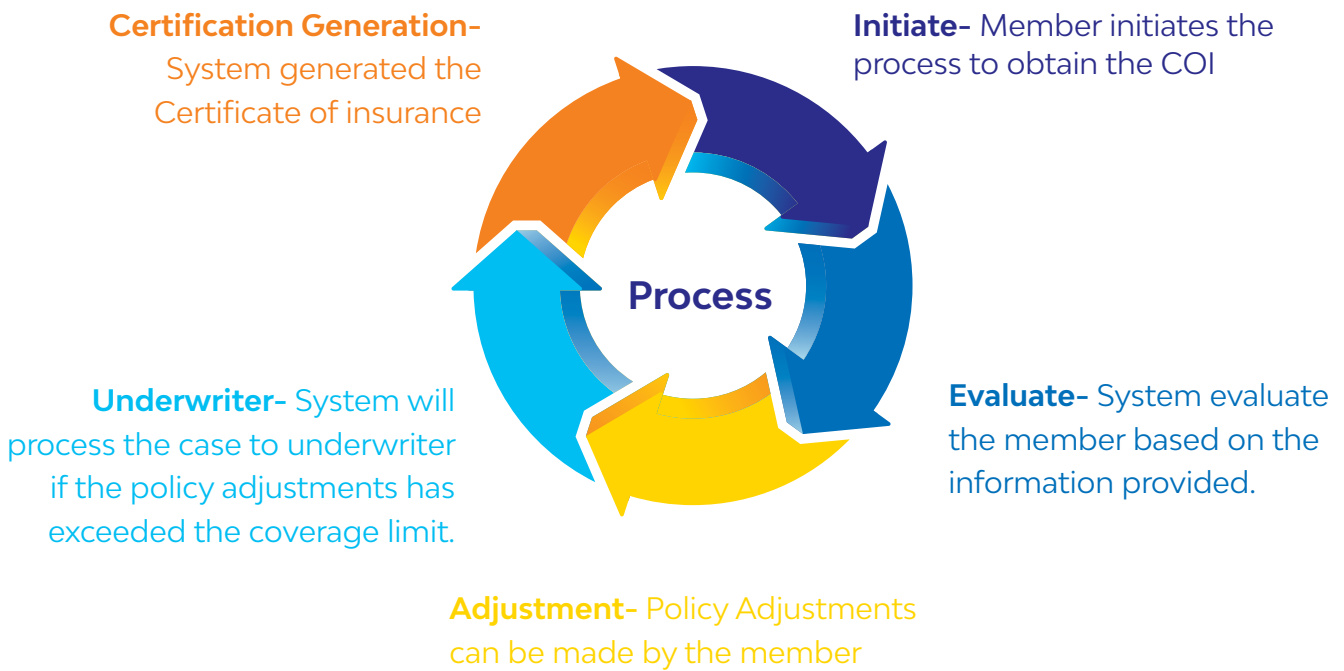


 **Overview**

Every insurance company goes through the lengthy, repetitive and rigid process of processing and issuing a Certificate Of Insurance (COI). Every year, millions of insurance certificates are issued in the US, the processing of which requires a tedious verification of the policyholders' details, types, and limits of insurance coverage, etc. This, in turn, leads to an increased strain on the company's back office and support processes.



# COI Sneak Peak



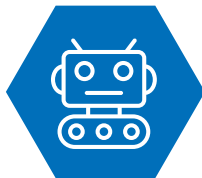
## Certificate Details

- COI contains separate sections for different types of liability coverages such as General, Auto, Umbrella, Workers compensation, etc.
- In addition to coverage levels, the certificate includes the policyholder's name, mailing address, and describes the operations that the insured performs.
- The certificate briefly describes the insured's policies and limits provided for each type of coverage. For example, the general liability section summarizes the six limits the policy offers filtered by category and indicates whether coverage applies based on each claim or each occurrence.
- All COI documents must be compliant with ACCORD and ISO standards.



## Features

- 1 Ability to roll out in various geographies with minimum turnaround time.
- 2 Compliant with ACCORD, ISO and other industry formats.
- 3 This solution automates and re-energizes the post-sales policy servicing interactions with the customer to the next level.
- 4 NLP helps with complete automation of customer queries over email, while traditional CSR capabilities help for in-person attention.
- 5 Millennial GenX customers are covered by the Pega Chatbot and Self-service Portal.



Chat Bot



Self Service Portal



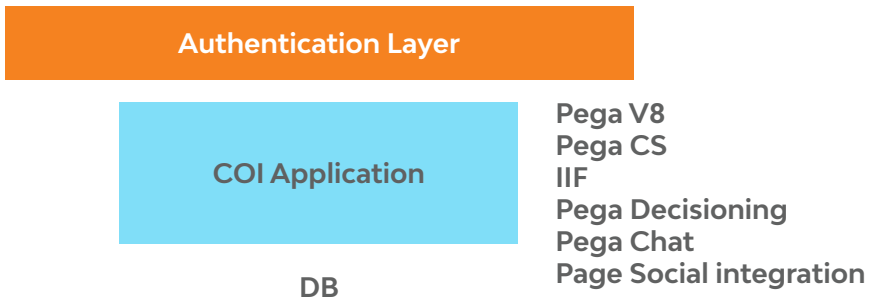
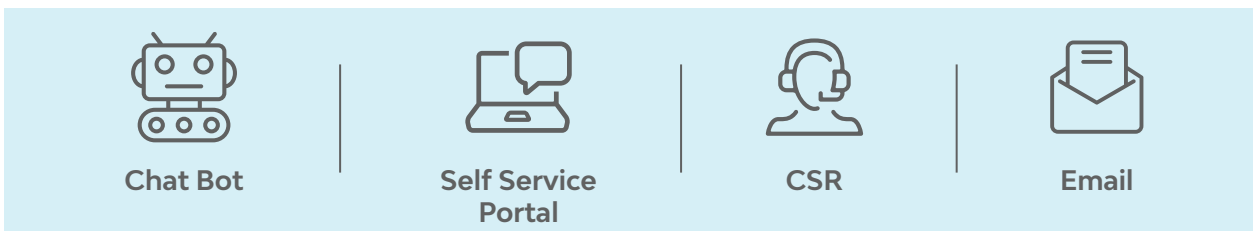
Email



## Technology Components

- Virtual Agent chatbot is available for the members for extracting the COI.
- Email NLP processing in place that provides a process with AI capabilities.
- Leveraging the PEGA standard framework and its OOTB features which includes: Decisioning, Chat and Social integration, etc.
- Self-service portal for the members to be able to drive the flow.

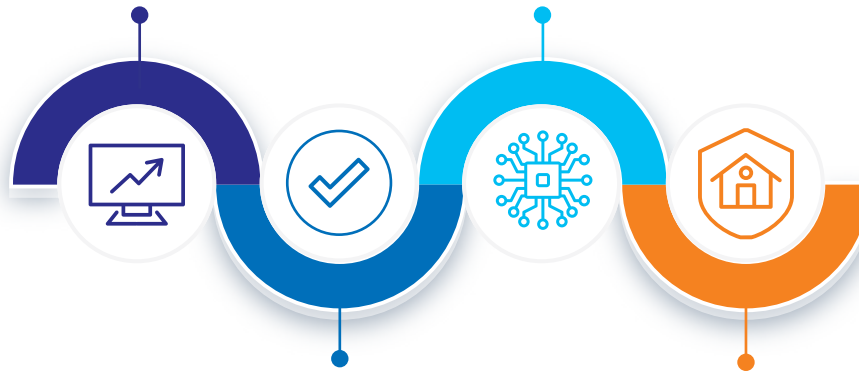
### Channels



## Business Outcomes

Self Service portal, Chatbot and Email Assistant, number of calls to CSR will be reduced.

Supports Multiple channels



Customer-driven flows to make sure the context is not missed.

Certificate of Insurance download is available all the time.

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