



# Customer Self-Service Portal Solution



**Microsoft Partner**  
Gold Application Development  
Gold Collaboration and Content



## Customer Profile

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The client offers a broad selection of insurance and financial products covering diverse markets and specializes in individual life, accident and disability insurance coverage in 49 states, the District of Columbia and Puerto Rico. Its critical illness products offered directly to individuals, provides voluntary, supplemental benefit products through payroll deduction programs.

## The Challenge

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The company was set up with the underlying business advantage that a large proportion of Americans are under-insured in the current economy. The company's voluntary benefit plans cost as little as \$5 per week and they are 100 percent portable. In spite of this strong value proposition, the company's business goals were challenged by its lack of a distinctive online and mobile presence, limiting interactivity with target customers.

Also, without a robust online presence, customers had to submit forms manually and this required additional processing time and manpower impacting customer service, revenue and employee optimization.

With a limited online presence, the company had additional costs for hiring third party representatives and agents to bring in prospects and manage customer relations.

## Trigent Services and Solution

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Trigent architected and developed a highly intuitive, scalable and interactive solution with which the client could exceed its business vision. Trigent's SharePoint experts analyzed the existing extranet site and offered SharePoint assessment & advisory, implementation and mobile application development services with the goal of cleaning existing customer data, simplifying information accessibility / usability and ensuring that manual work was reduced to a minimum.

- SharePoint Business Connectivity ensured visitors could view and product related information and access FAQ on various products/procedures.

- The self-service portal, facilitated user registration for existing customers and empowered them to make changes to their personal information, such as address, beneficiary change and withdrawal of policy.
- InfoPath was deployed to simplify building of rich forms and reduce manual work. Authentication was form-based with the features of recover password and change password implemented. This made it easy for the users to access any required form without any hassle.
- To encourage interaction and seamless information flow, the team created a Wiki site and iOS and Android hybrid mobile apps on Apple and Play stores for mobile phones and tablets.

## Client Benefits

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- The company could now boast a robust platform which provided information on products and contact details, reduced the dependency on agents and help bring down operational costs.
- The platform's self-service feature for users to view subscription details and FAQs meant that the portal was truly useful to its target customers, i.e. individuals. This feature also reduced customer support calls drastically.
- It automated the submission of change requests and eliminated the effort of re-entering details by end-users.
- The platform provided users with a real-time view of their request and reduced the number of follow up queries, resulting in increased customer satisfaction.
- Presence on Apple and Google Play store facilitated quick user adoption increasing the number of prospects.
- The platform is designed to be enhanced in the future for online purchase and renewal of policies.

### Technology Stack

- SharePoint 2013 (Hosted)
- SQL 2012- SSIS
- Phone gap/Cordova

### Engagement

- SharePoint Assessment & Advisory Services
- SharePoint Implementation Service
- Mobile application development service

### Integration

- SQL Data warehouse