



Insurance HyperIntelligence Cards

Answers that find you

Wholesaler Rep Card

Use Case

Boost the productivity and performance of insurance sales teams by giving them instant access to the information they need to make fast, informed recommendations while on-site with brokers

Users

Wholesaler reps and managers

Business Value

In the increasingly competitive insurance industry, it has become more difficult for sales reps to close deals and for companies to realize a return on their substantial investments. Arming wholesalers with relevant data at the point of customer interaction empowers them to close deals more quickly, develop better customer relationships, and differentiate themselves from the competition.



Watson Insurance

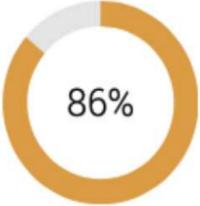
[Update Account Status](#)

Address	9251 Oak Street, Trenton NY 08607
Primary Contact	Brian Martin
Contact Email	bmartin@watsoninsurance.com
Top Competitor	Freedom Insurance
Annual Premiums	\$3.9M
Premiums Vs.LY	1.80%
Customer Count	3,792
Policies/Customer	1.3

Performance KPIs



Retention Rate



Customer Satisfaction

Our Universal Life Policy performs well in this market and is not currently offered by this broker.

Quote Card

Use Case

Give underwriters the critical information they need to quickly and thoroughly evaluate insurance applications

Users

Personal and commercial line underwriters

Business Value

Underwriters are tasked with balancing the quick turnaround times expected by customers with the important function of making sure that the company does not assume too much financial risk. Arming underwriters with the data they need to make informed decisions empowers them to quickly evaluate policy applications, accurately assess risk, and provide high quality premium and coverage recommendations.



Quote # 592153

Type: Homeowner's Insurance
Applicant: Susan Thomas
Address: 118 Weston Drive, Cranberry PA

[Approve](#) [Deny](#)

Insurance Score	820
Dwelling Type	Single Family
Year Built	2001
Square Footage	1,936
Material	Brick
Flood Zone	No
Occupancy	Owner
Policy Term	1 Year

\$398,000 Property Coverage	\$119,500 Liability Coverage
\$598 Premium	\$1,000 Deductible

This application meets all the eligibility requirements for this policy. Coverage approval is recommended.

Claim Card

Use Case

Give claims adjusters and processing clerks the information they need to expedite the claim resolution and payment process

Users

Claims handlers, audit investigation specialists, claims adjusters, claims processors

Business Value

Every year insurance companies process millions of claims - by improving the efficiency of the claims process through better access to information, insurers can shorten the length of time it takes to process a claim and get payments in the hands of their customers faster.



Claim # 12989
James Farley
Email: jfarley@mail.com
Phone: 904-555-7495
Type: Automotive
Policy # 4385673

[Approve](#) [Deny](#)

Claim Stage	Review
Age	12 Days
Claim Manager	Sri Verdu
Escalation Manager	Bryan Lyon

Customer KPIs

70%
Satisfaction Score

50%
Denial Rate

Tesla Make	Model S Model	2019 Year
\$2,835 Claim Amount	\$500 Deductible	\$1,683 Premium

Approve claim and issue payment within the next two days.

Product Card

Use Case

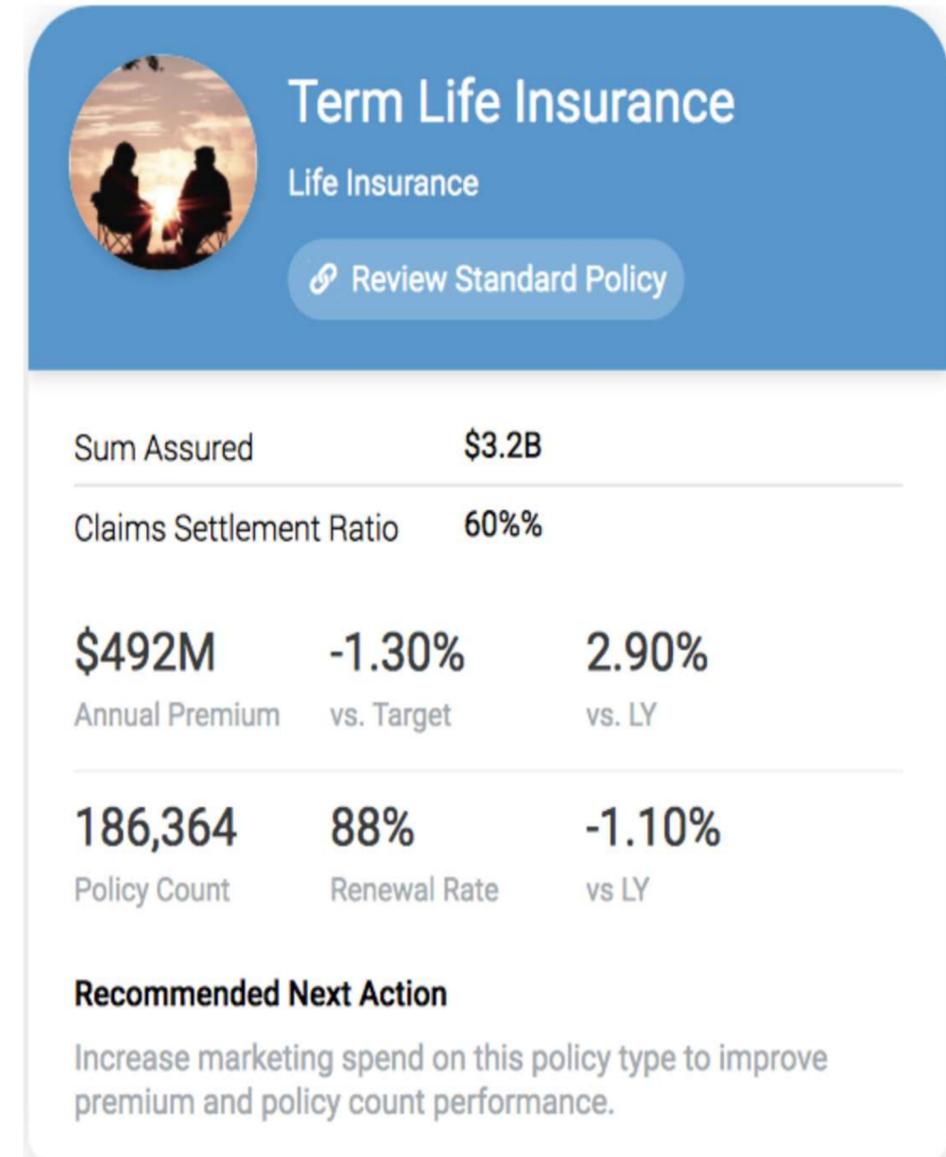
Give product management, sales, and marketing teams the information they need to evaluate policy performance and profitability

Users

Product management, marketing, sales agents, brokers

Business Value

Insurers offer a wide range of policies in order to meet their consumers' varied needs. Arming product management, marketing, and sales teams with instant access to policy performance information related to premiums, policy count, renewal rates, and profitability, empowers them to enhance their product offerings, modify pricing, and alter marketing strategies.



Call Center Case Card

Use Case

Arm call center representatives with the information they need to handle cases in an efficient, customer-centric manner

Users

Call center agents or managers

Business Value

Retaining customers not only makes insurance companies profitable, it helps to offset new customer recruitment costs. By arming customer service professionals with the information they need to quickly and efficiently handle calls, HyperIntelligence helps them deliver a better overall customer experience - resulting in happier customers who are less likely to churn.

Case # 349395

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[Escalate Case](#)

Active Policies	Auto, Home
Customer Since	2004
Case Owner	Sarah Bowman

Open **2 Minutes** **14 Days**
Case Status Call Wait Time Case Days Open

Customer KPIs

84%
Customer Satisfaction

11%
Likelihood to Churn

Recommended Next Action
Inform customer that her claim was approved today and that a payout should be made in the next 24 hours.