

Automating Forms-Driven Communications

Improve the total experience, increasing customer and user satisfaction and retention

Forms-driven communications are typically complex, manual, time- and paper-intensive business processes, involving multiple people, workflows, technology, and decision points.

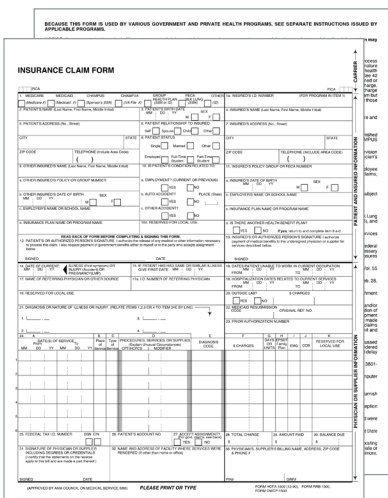
Broadridge has developed a solution that automates forms-driven communications by combining omni-channel communications, forms automation, and data collection.

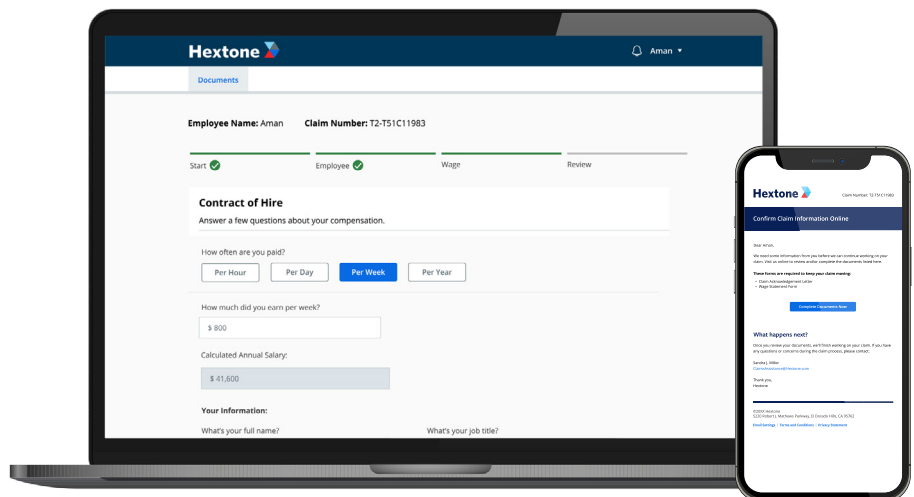
With these bidirectional, personalized communications, you can make it easier and faster for your customers to:

- File a claim
- Open an account
- Apply for a loan
- Make financial decisions
- And more

REPLACE BURDENSOME PROCESSES WITH A GUIDED DIGITAL EXPERIENCE TO IMPROVE THE CUSTOMER EXPERIENCE

- Increase form completion and accuracy
- Improve the customer experience and reduce errors by pre-filling information, automating calculations, and integrating e-signatures
- Guide customers through the process to help them complete tasks and anticipate what's next
- Notify customers of incomplete forms or if additional details are required
- Personalize the experience with a dashboard specific to each stakeholder
- Enable customers to choose their preferred communication channels





Hextone

Documents

Employee Name: Aman Claim Number: T2-T51C11983

Start Employee Wage Review

Contract of Hire
Answer a few questions about your compensation.

How often are you paid?
☐ Per Hour ☐ Per Day ☒ Per Week ☐ Per Year

How much did you earn per week?

Calculated Annual Salary:

Your information:
 What's your full name? What's your job title?

Confirm Claim Information Online

Dear Aman,

We need a few more details from you before we can confirm your claim. Please take a moment to review the information you've provided and confirm the details.

What happens next?
 Once you've confirmed your details, we'll be in touch with you again. Please keep an eye on your email for updates.

Thank you,
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Automating forms-driven communications improves the customer and user experience, connects front-end experiences with back-end technology and processes, and replaces legacy paper-based processes with digital innovations.

AUTOMATE WORKFLOW AND PROCESSES FOR FASTER DATA COLLECTION AND FORM COMPLETION

- Decrease time and effort of opening, processing, and closing claims, accounts, loans, etc. – the solution can be applied to any vertical that requires customers to complete forms and firms looking to improve the digital experience
- Tailor content and workflows, using self-service tools, to ensure the right data is collected at every step in the process while satisfying regulatory and security requirements
- Identify errors and resolve issues quickly, shortening process completion time
- Give users a complete view of the communication journey and where they are in that journey
- Monitor the status of the forms collection processes
- Replace print, mail, and fax with an automated, digital workflow through a single API call
- Reduce costs – paper and postage, labor, technical, etc.
- Introduce digital delivery to customers while offering the ability to save PDF copies or print documents locally
- Authenticate customer identities with the use of one-time passcodes (OTPs)

“Key outcomes include an increase in cyber security, a more efficient form completion process, and a reduction in mail notifications.” - Top-tier P&C insurer

Let's talk about how you can make every communication more valuable. Contact us today by visiting broadridge.com or calling +1 415 805 9772.

Case Study

Integrating and Automating Insurance Claims and Communications

Top-tier P&C insurer digitizes claims and communications management to reduce the time and cost of opening, processing, and closing claims while driving efficiencies and better experiences.

OBJECTIVES:

- Overhaul claims workflow and drive the digitalization of gathering information
- Reduce the number of forms and letter templates while standardizing customer messaging and branding
- Automate repetitive, manual processes to expedite the claims process
- Enhance customer experience and streamline communications

BROADRIDGE HELPED THE INSURER:

- Combine workflow and customer communications management to streamline the workers' compensation claims process
- Drive efficiencies and improve the customer experience, including forms creation and rationalization, data entry and claims forms handling, transaction communications delivery, storage management, and status reporting
- Transform a traditionally paper-ridden process into a digital-first experience

Broadridge Financial Solutions (NYSE: BR), a global Fintech leader with \$5 billion in revenues, provides the critical infrastructure that powers investing, corporate governance, and communications to enable better financial lives. We deliver technology-driven solutions that drive business transformation for banks, broker-dealers, asset and wealth managers and public companies. Broadridge's infrastructure serves as a global communications hub enabling corporate governance by linking thousands of public companies and mutual funds to tens of millions of individual and institutional investors around the world. Our technology and operations platforms underpin the daily trading of more than U.S. \$9 trillion of equities, fixed income and other securities globally.

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