4 key considerations before deploying insurance policy automation solutions

Customer service in insurance remains one of the industry's most important drivers. Insurance policy automation solutions, delivered through communications automation with generative AI (GenAI), streamlines operations, reduces costs, accelerates ROI, and improves CSAT for greater revenue.

To find success with insurance policy automation, your insurance organization must strategically implement communications automation with GenAI. **Use the following checklist to understand what to take into consideration while selecting a provider and preparing for implementation.**

Consideration #1: Assess current goals, processes, and staff	Complete
Identify business goals Define your overarching goals, such as streamlining processes, increasing accuracy, or enhancing customer experience.	
Evaluate current operations Review current policy management procedures and identify aspects where automation can make the greatest impact.	
Measure staffing needs Evaluate the size and skills of your workforce while identifying any training needs. Are there gaps in your workforce? Where could you use GenAI support?	

Consideration #2: Review and assess your data quality and storage	Complete
Data quality Before implementation, your insurance organization's customer data should be consistent, complete, and up to date.	
Data storage Increasing the use of GenAI in your workflows may increase the amount of data your insurance organization will need to store on a regular basis. Assess your data storage size to ensure you have plenty of capacity for additional storage.	

Consideration #3: Assess the capabilities of your potential communications automation solution	Complete
Compatibility The solution should easily integrate with CRM, billing, and underwriting platforms.	
Scalability The solution should allow your business to scale, e.g., dealing with a higher number of interactions and peak times.	
Flexibility The solution should allow your contact center to adapt to changing business requirements and enable upgrades and modifications.	
No-code/low-code automation The solution should allow you to create and manage communication workflows quickly, without ripping and replacing, and without extensive technical knowledge.	

Consideration #4: Your provider meets insurance industry security and reliability regulations	Complete
Security The platform should include: • Two-factor authentication to enhance identity verification. • AI-driven fraud detection that analyzes customer interactions in real-time and identifies suspicious behavior. • Automated alerts and intervention measures to prevent potential security breaches. • Management of user access to contact center systems and databases, ensuring only authorized personnel have access to sensitive customer data.	
Reliability The platform should include: • Continuous service availability through automated failover processes in the event of system failures or disruptions. • Optimized resource allocation such as cloud-based server capacity to ensure reliable system performance during peak demand.	

Are you ready to transform your insurance organization?

Implement insurance policy automation solutions with IntelePeer and adopt an omnichannel strategy to enhance insurance customer experience, alleviate staffing burden, and drive higher profitability.

With IntelePeer, you can provide excellent service and embrace the future of insurance customer experience today.

Contact us to get started now.

Do you want to learn more about which AI and automation gaps are hiding in your contact center? **Schedule an AI and automation Customer Interaction Intent Study with IntelePeer now.**

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