rveggo

Individual Life & Health Insurance



Deployment Mode



Swift Implementation



User Proficiency

The platform enables the automation of subscription and endorsement process for Life and Health Individual product. Providing digital components for consultation, servicing (new business, endorsements), KYC, workflow, electronic signature, acceptance and connection to PAS system. The solution covers various lines of businesses, among them: savings, pension, protection, mortgage insurance, healthcare insurance



Accelerated Launches & Onboarding

Faster time to market and streamlined client acquisition.



Team Empowerment & Client Delight

Equip teams with customisable tools for stellar client experiences.



Optimal Data Management

Integrate and unify data management for enhanced data integrity.



Security & Compliance Mastery

Reinforce data protection and compliance with robust measures.



Seamless System Integration

Achieve effortless synchronisation with existing and legacy systems.



Innovative Market Dominance

Propel your standing with cutting-edge solutions for a competitive edge.



Customisable Digital Pathways

Intelligent system to craft streamlined, datadriven customer journeys.



Broad Business Line Support

Coverage for savings, pensions, protection, mortgages, and healthcare.



Modular & Adaptable Design

Tailor platform to seamlessly suit your business needs and goals.



Omni-Channel Collaboration

Integrate white-labeled channels $\boldsymbol{\epsilon}$ seamlessly collaborate across roles.

1 Prospect Selection

- Prospect Creation
- Activate/Deactivate simulation
- Activate/Deactivate needs analysis
 - Needs analysis questionnaire
 - Investor profile questionnaire

2 Product Selection

- Producer code selection
- Displays recommended products
- Product selection Simulation (Offer)

3 Simulation (Offer)

- Simulation questionnaire
 - Displays formulas
 - (packages)
- Projection based on profile
 - Formula selection
- Create offer from simulation

4 Proposal

- Complete information
- Hedge selection
- Choice of investment strategy
- Projection based on strategy
- Service selection
- Policyholder and role validation
- Clause selection
- Payment information Documents

5 Consents

Validate the consent questionnaire

Contract creation in the back office

7 Implementation of Management

_____ 6 Documents

- Required documents
- Generated Documents
- E-signature





Purpose-built platform designed to maximise your edge.

