



# ACTIONABLE INTELLIGENCE

DELIVER MORE VALUE VIA PERSONALIZED PORTFOLIO RECOMMENDATIONS IN REAL-TIME.

## How to turn your data into revenue with Novidea

ACTIONABLE INTELLIGENCE GIVES YOU

**Profitability Optimization**

**Data Monetization**

**Customer Intelligence**

**500+ Prebuilt Reports & Dashboards**



### Use Novidea's automated tools to identify cross-sell and up-sell opportunities:



Define what you want to sell



Apply filters



Generate leads



Track the sales funnel & conversion ratios

Growing competition and shrinking commissions are driving insurance agents to lean harder on technology to compete. But data has little value without tools that help agents translate it into action - from what products to recommend to which clients to up-sell.

Talk to agents, and they will tell you it's a nightmare to pull any kind of useful data from their systems - let alone interpret it. Principles can't see what's going on with their producers, producers can't see opportunities for growth, and customers aren't getting the value they expect. But it's not just an integrated system and 360-degree visibility that's needed - it's also the power to connect the dots and uncover hidden opportunities.

With Novidea's Actionable Intelligence, easily, quickly and confidently understand exactly what your data means and what it is telling you to do.

### ACTIONABLE INTELLIGENCE AUTOMATICALLY TURNS:

- Back-office purchasing histories and behavioral patterns into front-office sales opportunities, up-sell and cross-sell
- Reports into concrete, real-time recommendations
- Intelligence into improved revenue, client profitability and renewal rates
- Conventional customer service into value-adding customer guidance

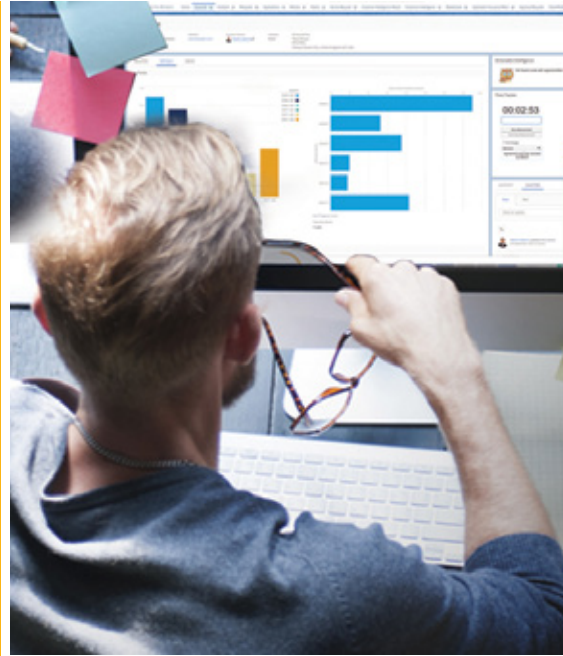
### WITH JUST A FEW CLICKS, NOVIDEA'S CUSTOMER INTELLIGENCE TOOLS:

- Provide an integrated view of each customer
- Empower agents to make informed decisions;
- Drive new up-sell/cross sell business from existing customers.

## RESHAPE CUSTOMERS' EXPERIENCES

Insurance is a customer-centric business at its core. However, many agents are not living up to their customers' expectations when it comes to the experiences they deliver. The data-driven insights from Novidea makes personalizing communication that much easier. By using real-time customer intelligence, agents can deliver more tailored advice which in turn pays significant dividends in terms of bottom and top line.

Actionable intelligence brings more revenue per customer & higher margins for the agency



*Relationships will always be the foundation of insurance distribution – but data has the power to make them better than ever.*

### ADVANCED PROFITABILITY OPTIMIZATION

Advanced Profitability Optimization offers management extensive dashboards and reports, and the visibility and insights readily at their fingertips to determine how the different business lines are performing. Agents can identify and nurture their most profitable

customers. They can get actionable insights into questions such as:

- Which customers are profitable, break even, or unprofitable for the business?*
- What is the total income a customer brings vs. the number of staff hours and resources the customer requires?*
- What is the customer's claims history relative to policy income?*

Quantification of time, resources, and effort invested in the insurance portfolio relative to actual revenue is now made remarkably easy and granular. Ready access to these answers guides renewal strategy, pricing decisions, and management of staff's time and resources — all of which significantly impacts overall profitability and growth.

