KNOWLEDGE AND ANSWERS

# Claims and customer service across systems

THE MOMENT

*A customer calls about their claim. The handler opens four systems while the customer waits.*

Policy terms, claim file and correspondence brought together in one answer with sources; the handler verifies and decides.

## THE FLOW

1. **Question arrives** — Automatic
2. **Ask in context** — Handler
3. **Answer with sources** — Automatic
4. **Verify and decide** — Handler

| Blueprint BP-16 | |
|---|---|
| SECTOR | Insurance and financial services |
| PROCESS | Knowledge and answers |
| STARTS WITH | Customer question |
| RESULT | Answer with sources |
| BUILDING BLOCKS | Mindbreeze · DMS · CRM |

Version control · Permissions

## Recognise this moment?

Tell us about your own process. We look at it with you, without obligation.

DISCUSS THIS PROCESS
softadvice.eu
/plan-a-call

READ THE FULL BLUEPRINT
softadvice.eu
/mindbreeze/use-cases/claims-customer-service