

# Applied CSR24®

## is online and mobile customer self-service technology.



**Our online and mobile customer self-service application Applied CSR24 is the first of its kind in our industry that keeps your customers and systems connected to your business.**

It lets your customers obtain proof of insurance, access insurance documents, make premium payments, report First Notice of Loss, and track claims processing when and how they want. Giving customers the convenience to self-serve in turn frees up your team to focus on other revenue-generating activities.

But don't worry about falling out of the loop. The software syncs customer interactions with your Applied Epic® management system so that you always have the latest customer details.

You can take your customer portal and mobile app a step further by customizing it to match your branding to elevate the perception of your agency.

Meet the digital demands of today's consumers to increase client satisfaction, build client loyalty and stand out among the competition.

### Allows your agency to

- Improve customer retention and acquisition through increased customer satisfaction
- Increase employee productivity
- Elevate agency brand to build customer loyalty and acquisition
- Gain greater business insights to deliver a more valuable experience

“Applied CSR24 is extremely beneficial to us and our customers. They love the portal and the flexibility and efficiency to access certificates quickly.”

– Frank Swingle, CEO, Swingle Collins & Associates



# Core Capabilities



## Mobile App

Applied MobileInsured allows your customers to get insurance information, documents, online bill pay and messages while on the go from the convenience of their mobile device.

## Virtual Assistant for Claims Management

Automated chatbot in Applied MobileInsured collects details on the claim in a simple, conversational interaction. Once the policyholder has submitted the claim, you have the option to respond, keeping that personal touch in their time of need.

## Document Management

Provides flexibility to alter the documents each client receives to best match their unique needs.

## Policy Management

Gives customers the freedom to make policy changes on the go from an app that syncs to your management system.

## Agency-Branded Portal and Mobile App Experience

Gives you the ability to customize your customer portal and mobile app by adding images and specific colors consistent with your brand.

## Premium Certificate Processing

Eliminates duplicate data entry of coverage and policyholder information through integration with your management system. Allows you to access the latest ACORD forms and use customized templates to process certificates faster.



## 24/7 Call Center

Makes sure someone is there to service customers anytime without the expense of around-the-clock staffing. Using the online portal, operators answer questions, receive claims, and request policy changes on behalf of customers at any time of the day.

## Self-Service Portal Analytics

Provides data on which portions of the portal your policyholders are using the most so you can make these features more accessible.

## Payment Processing

Offers customers the option to pay their direct-billed policies in one place versus visiting multiple insurer sites for payment processing.

## Have Questions?

Call 800.999.5368  
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