



EMPOWERING INSURANCE AGENTS AT SCALE FOR AGEAS FEDERAL LIFE INSURANCE

Google

4.0 ★★★★★☆

Clutch

4.9 ★★★★★☆

glassdoor

4.5 ★★★★★☆

Countries we operate from



PROBLEM STATEMENT



AFLI, one of India's leading life insurers, faced significant challenges in agent-led distribution:

Lack of real-time insights into leads and performance.

Limited mobility support affects agent effectiveness.

Disjointed workflows hinder onboarding and sales.

Paper-based proposals slow policy issuance.



A full-stack, mobile-optimized **Agent Portal** that digitized the entire agent journey — from onboarding to commissions and lead follow-ups.

- ✓ **Lead Tracker:** Gain visibility into your sales funnel with our Lead Tracker.
- ✓ **Proposal Engine:** Use our Proposal Engine with pre-fill, validation, and a calculator for easy proposal creation.
- ✓ **Commission Dashboard:** Track payouts and project future earnings with our Commission Dashboard.
- ✓ **Learning Hub:** Enhance skills with our Learning Hub, featuring an LMS and certification workflows.
- ✓ **Digital Onboarding:** Experience efficient Digital Onboarding and eKYC with real-time validation.



6-Step Applied Process

01

Ground Research:

Conducted workshops and interviews in cities and rural areas to define agent personas and challenges.

02

Journey Blueprinting:

Mapped agent journeys from onboarding to servicing; outlined integrations with TCS BaNCS, CRM, DMS, and payments.

03

Experience Design:

Designed mobile-first UX flows for agents, optimized for mobility and offline use.

04

Agile Build & Pilot:

Iterative builds deployed on web and mobile; validated usability with 50 agents and 10 RM supervisors.

05

Performance & Security Engineering:

Supports 5,000+ users with role access, encryption, and 99.95% uptime.

06

Engagement & Gamification Rollout:

Enabled leaderboards and badges to boost agent participation and logins.

41%

boost in lead-to-policy conversions within 9 months

37%

reduction in servicing TATs for surrenders, revivals, and claims

28%

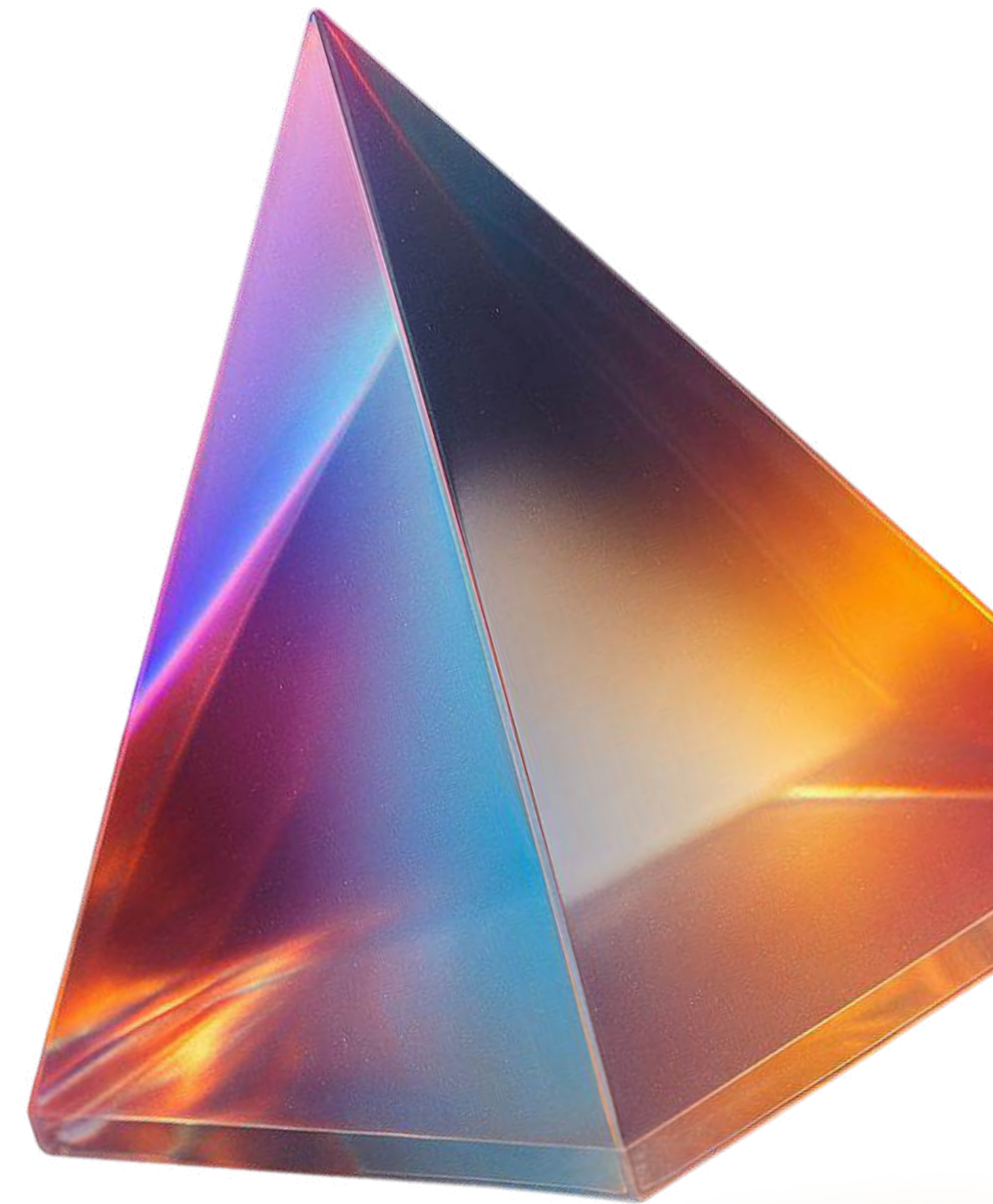
faster onboarding, reducing early agent churn

Greater loyalty from improved commission visibility and recognition tools

32%

increase in average monthly agent logins

Higher retention via gamified engagement





Let's Help You

Delight Your Customers - The easiest way to achieve growth



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45+ Countries

30+ Awards

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