

## Indio

is the solution to digitize the insurance application and renewal process.



**Indio is a modern solution that enables agencies to automate internal application and renewal processes, eliminating redundancies in data gathering to minimize E&O and provide insureds a simpler, more collaborative customer experience.**

Indio provides a fully digital client risk capture and application experience by automating the data population across individual, unique insurer applications.

The application uses smart-form automapping to reduce the need for rekeying client information across multiple applications, increasing efficiency while reducing errors and omissions.

With Indio, customers can have multiple agency staff members participate in the application process, tracking individual edits and allowing for collaboration on responses.

Indio simplifies the insurance application process to make it faster, more collaborative and easier, and minimize errors and omissions, saving you and your clients time and money.

### Enables your agency to

- Significantly reduce duplicate data entry and time wasted compiling multiple insurance applications.
- Automate the data population across multiple insurer applications to eliminate duplicate data entry for customers while reducing errors and omissions risk.
- Simplify the application process for prospects and customers so you can more effectively cross-sell/round out accounts and increase customer retention.

**“We sent an application to a client [using Indio] and within 12-minutes we had back the completed application signed.”**

– Allan Morton Jr., President, Morton Insurance & Risk Management

# indio

## Core Capabilities

### Send Insurers/Underwriters Submission Packets

Once your customer has reviewed, signed, and submitted their submission packet, you can send forms/applications to a specific underwriter from within the Indio platform, along with a custom message .

### eSignature

Allow your customers to sign their applications natively within the Indio platform. This removes the need to download, print, scan, fax, email, and/or snail mail the many forms that are required to be signed during the application and renewal process.

### Extensive Application Library

Access the vast library of more than 14,000 insurance applications, including common forms, supplemental insurer applications, custom agency applications and questionnaires. By using online, digital applications, you create a single data capture process and simplified data mapping to automate application completion.

### Intelligent Activity Tracking

Stay informed of when your customers log into the Indio platform, fill out information, sign forms, and submit data. As they make changes, Indio intelligently shows you which changes were made so you no longer have to search line by line.

### Collaborative Environment

Give multiple teammates from your customer's organization access to specific applications, allowing for an online, collaborative application experience. Clients can easily leave comments and questions on any part of an application that they are unsure about to help facilitate a streamlined process.



**Indio shortens the application and renewal process for brokers by up to 50%**

Source: Indio

### Renewal Verification

When creating a renewal packet for your customer, data from the prior year auto populates into the new year's forms and applications, alleviating the need to rekey duplicate data year over year. When reviewing a renewal packet, clients simply verify which information has remained the same and edit what has changed from the prior year. All your client's verifications and edits are logged in the Indio platform to mitigate your agency's error and omissions exposure.

### Bi-Directional Integration with Applied Epic

Stop wasting time rekeying data between Indio and your Applied Epic management system. A bi-directional integration allows you to seamlessly exchange data between the two systems.

### Schedule Workbooks

Existing schedule workbook data can be uploaded into the platform and instantly become an interactive online table. This allows you and your clients to collaborate without having to share large Excel files and documents.

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## Have Questions?

**Call 800.999.5368**

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