AI-AGENT DIGITAL PLATFORM
One Platform, Centered on You

FPT · **AIDP**

Fast – Simple - Reliable

AI-Agent Digital Platform (Or AIDP) is a pioneering AI-integrated platform for frontline insurance agents that aims to streamline operations, manage tasks, strengthen team and client relationships.

All-in-one Platform for All Agents

Insurance Company	• Manage a large database of information from agencies and nationwide operation. • Provide information and training for agents.
Agent Manager	• Track overall sales performance. • Learn about products and customers. • Support agents in their career path.
Agent	• Manage leads, customers, and candidates. • Adapt to different operation models. • Learn about products. • Reduce paper-based work and manual effort.

AI-Powered Comprehensive Features

Host App

DASHBOARD

Track sales metrics, KPIs, and more.

UPCOMING ACTIVTIES

Display ongoing work tasks that need to be monitored for completion.

OVERVIEW

Keep track of calls, leads, and tasks to be done.

AGENT PROFILE

Show agent's basic information.

CASE SIZE

Display the number ofcases in progress and the current progress of the cases.

NOTIFICATIONS

Show notifications about Lead Activity, Goals, and more.

Mini App

CARE

Support customer requests.

CAMPAIGN

Carry out digital marketing campaigns, publish content on social platforms.

ACADEMY

Facilitate remote employee training and license management.

LMS

Manage leads with AI suggestions.

RECRUIT

Support new agent recruitment, candicate onboarding, tracking career path.

SALES

Streamline sales activities; collect customer Information.

Empowering Agents
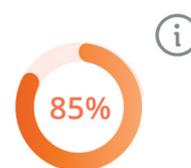
Personal Performance Tracking

- Focus on key objectives.
- Manage activities with **ONE CALENDAR.**
- Set up calls & activities.

01

LET'S ACHIEVE YOUR GOAL
12 days remaining

Actual	Goal
51,000,000 VND	60,000,000 VND

85%

Team-Sales Review- Feb 2023
08:00, 20/02/2022

Meet Ms.An- Make an application
08:15, 20/02/2022

Call Mr.Kevin to consult
13:00, 20/02/2022

Today

89%	67%	38%	29%
9	9	8	7
8	6	3	2

Hanna

Hi there! 👋
My name is Hanna.
I always available to help you.

View pending policies

Today's activity suggestion

Hot training courses help you grow up your career

AI-Powered Assistant

- Remind for further steps
- Suggest personalized next actions
- Show pending tasks

02

Training Support

- Register to courses.
- Join class and complete assignments/exams.
- Manage license, e-certification.

03

Empowering Agent Leaders
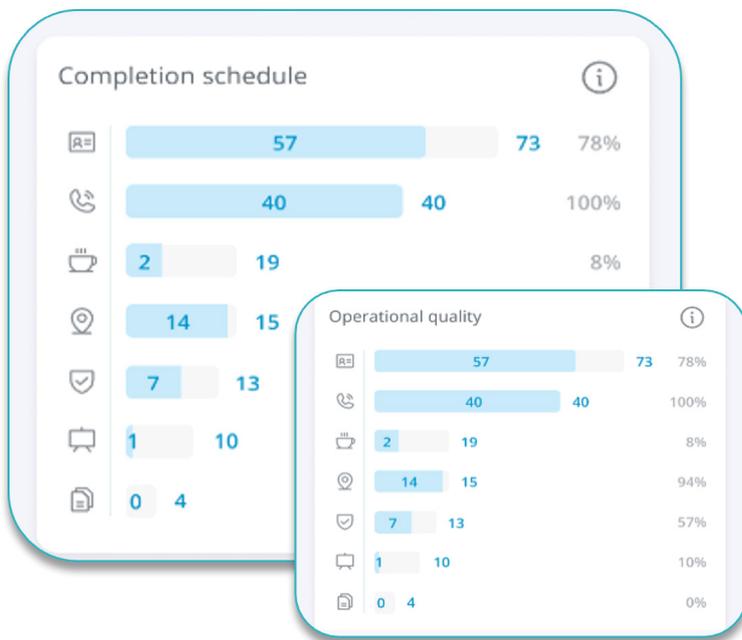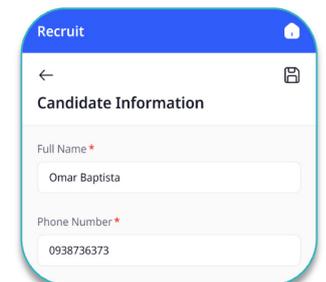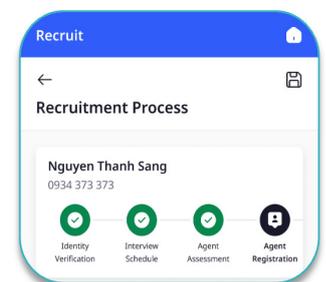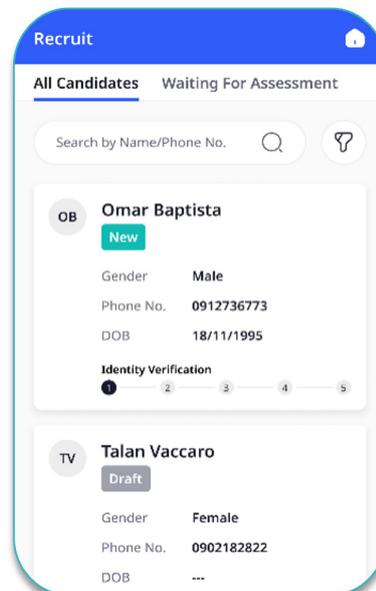

Personal & Team Performance Tracking

• Monitor personal and team KPI.
• Identify member issues to provide more support.

01

Recruitment Progress Tracking

• Monitor recruitment progress. Increase transparency with OCR and eKYC.
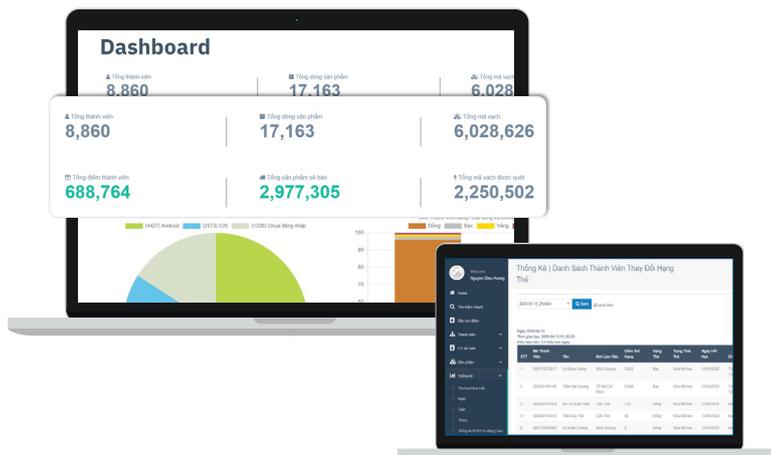• Schedule interviews.
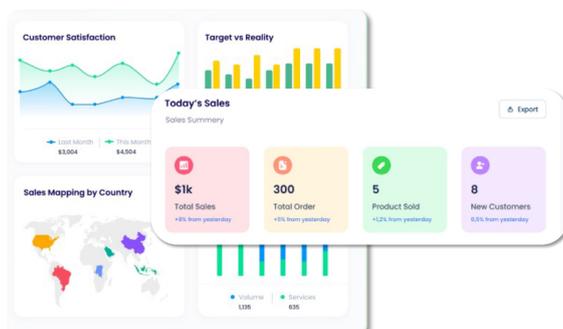• Submit documents digitally.

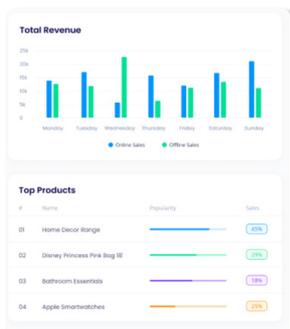02

Empowering Insurance Company

Web Admin

- Manage diverse data.
- Search and retrieve information easily.

01

Customer & Lead Management

Empowering Sales Processes

Digital Marketing Management

- Engage with customers
- Design and post content.
- Collect potential leads.

01

Support Sales Process

- Submit online policies (customer verification, health declaration, and more)
- Support face-to-face and online sales.

02

CAMPAIGN DETAIL   ✕
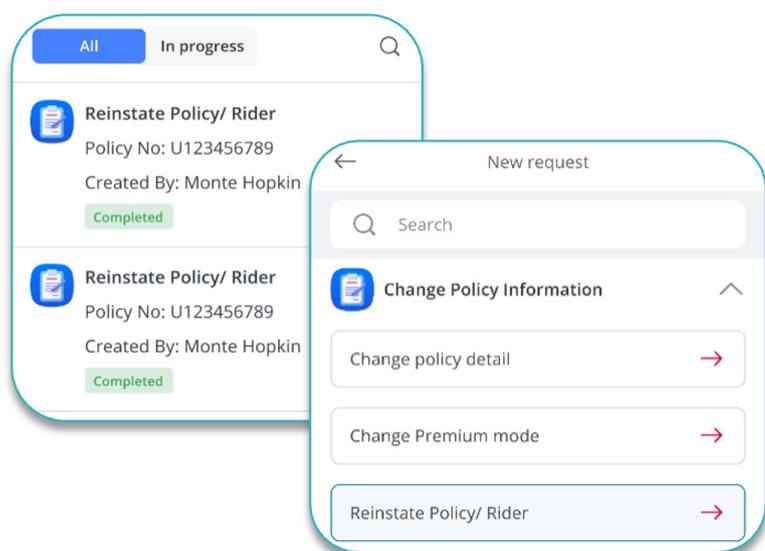

TÀI CHÍNH ĐẢM BẢO SỨC KHỎE AN VUI

#NewProduct

Live well

Sustainably Living product is a comprehensive insurance solution against cancer risks, helping you choose a sustainable lifestyle for the journey of experiencing life with loving moments with your family...

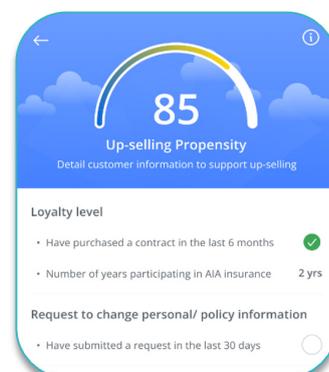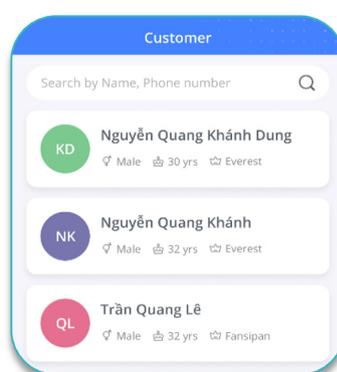# Empowering Customer Engagement

Customer Support

- Submit service request
- Send review page to customers with OTP verification.

01

Customer Management

- Manage customer list.
- Optimize customer relationships.
- Upsell and cross-sell with AI insights.

02