

Olivo Product Fact Sheet - October 2024

Module	Description
OlivoBot	Client-facing AI virtual assistant
Channels	
Digital	Deploy OlivoBot online over any of your digital channels (web, mobile app, email, WhatsApp, Messenger, Facebook, Instagram, X/Twitter, etc.).
Phone to Digital	Add an option to your phone system that allows the client to receive, on a smart phone, a text message including a hyperlink to OlivoBot, effectively redirecting phone traffic to your digital channel.
Phone	Add an option to your phone system that connects a client to our interactive voice recognition (IVR) system so that the client can talk to OlivoBot.
Processes	
Quoting	OlivoBot collects all the information required for quoting. Then, leveraging integrations with major rating engines and some individual carrier rating APIs, OlivoBot can provide the client with quotes.
Policy Changes	Once a client has authenticated, OlivoBot can retrieve that client's policy information and collect data related to the desired changes.
Advice	Clients can ask OlivoBot questions before, during, or after completing a process. OlivoBot provides contextual answers and then resumes the original process being completed.
Products	
P&C Personal lines	Homeowner, Condo, Tenant/Renters, Auto, Snowmobile, Motorcycle, RV, ATV, Boat
P&C Commercial lines	Auto, Property, General Liability, E&O, Cyber, Aviation
Integrations	
Rating engines	Integration with Applied Rating System for real-time quoting of personal lines and commercial auto.
AMS/BMS	Integrations with Applied EPIC's SDK for lead creation, client authentication, policy changes.
CRM	Integrations with Salesforce, Odoo, and Zoho
PAS	Integrations with Guidewire for quoting and AMS/BMS upload.
Scheduling	Integrations with major calendar systems so a client can schedule an appointment with one of your agents in order to finalize a transaction.
Address validation	Integrations with services for address completion and validation (CanadaPost, Google maps, etc.)
Other features	
Display mode	Client can toggle between a widget with panel viewing mode and a full screen mode.
Form UI	Client may display a form, side-by-side with OlivoBot's panel in order to provide the required information.
Login/Sign up	Creation of/access to a customer account that contains (partial) information provided for an application.
Editable entries	Ability for the customer to scroll up the conversation to edit previously provided pieces of information.
Contextual information	A question mark image can be displayed at the end of an OlivoBot prompt. Upon clicking on the image, the client is provided with more details related to the question asked (e.g., what is a registered owner of a vehicle).
Document sharing	Client can upload documents to complement the information captured by the virtual assistant.
Bot share	Ability for the agent to take control of the conversation to finalize a transaction, effectively replacing the virtual assistant. If needed, the agent can share the conversation back to the client.
Signature	Collection of customer signature for final validation of information before application submission.
Partial leads	When a client abandons the quoting process, information collected can be sent to your AMS/BMS so the client can later be contacted.
Up/Cross-selling	Ability for client to combine multiple products (for example auto and home insurance) in the same quote.
Regional features	
Q.P.F. #5 (Quebec)	For automobile insurance, OlivoBot can get a quote for the Q.P.F. #5 car replacement insurance.
OlivoLive	Agent/Broker application for customer interactions
Features	
Communication mode	Clients can opt to communicate with an agent/broker via livechat, voice, or videoconferencing.
OlivoBot conversation pull	Once connected with the client, an agent can access the OlivoBot conversation and add to or modify the information entered by the client.
Summary table	All of the information captured by OlivoBot is displayed in tabular format with entries that are editable and can be listened to. Warning signs are displayed to direct the agent's attention towards potential underwriting concerns.
Broker path	Ability to gather additional information from agent who completes a quote for a client (employee id, policy sold, etc.), including free-form or template-based notes.
Departments	On the OlivoLive communication app, you can separate users in different departments (sales, services, etc.) so that a user will be directed to the right people depending on what they were doing on OlivoBot before being transferred to a live agent/broker.
Mobile App	All the features from the OlivoLive product as an app for mobile devices.
Live translation	All client messages can be translated to the language of the agent/broker and agent's/broker's response can be translated back to the clients' language. More than 40 languages supported.
QR codes	
Conversation Lake	Customizable, dynamic interface that lets agents manage interactions, in real-time, across all channels: assign tasks, monitor conversations, search through records, audit interactions, and even edit information. Agents can access the OlivoBot and OlivoLive conversations in real-time.
OlivoAnalytics	Manager's BI application
	Dashboard allowing to drilldown into the sales funnel and other processes, across all channels, to derive insights and patterns into customer behavior.