

Digitally Transforming Health and Medicare Insurance With Lightico

Insurance Agency Leverages Lightico to Slash Turnaround Times by 80%



Background

Affordable Medicare Solutions (AMS) is a health, Medicare, and life insurance agency making affordability and ease a reality for thousands of clients across **Southeastern USA**. The company focuses on client education and making insurance easier to manage. Agents act as consultants for their clients to help them sign up for the most appropriate, affordable plans as easily as possible and annually review their plans.

With the Medicare enrollment season coming up, the company's president, Keith Nabb was looking to harness intuitive digital tools to improve the customer experience and improve back end efficiency for Medicare enrollments.



Challenge: A Daunting Enrollment Process

Slow Turnaround Times and Inefficiencies of Collecting Forms and Signatures on Medicare Enrollments

AMS and its customers had a difficult time navigating the busy enrollment season with processes that relied on hard-to-complete email requests, time-heavy personal meetings,

and bulky legacy systems. This period became both resource heavy for AMS and burdensome for customers.

Moreover, because AMS primarily serves elderly clients, these processes became nearly impossible as clients struggled to understand and complete the heavy paperwork. Many customers were forced to use a relative's scanner, printer, or computer to complete forms leading to customer frustration, slow turnaround times, high error rates, and low completion rates. To make matters worse, in some cases AMS agents had to physically go to the client to help them complete forms.

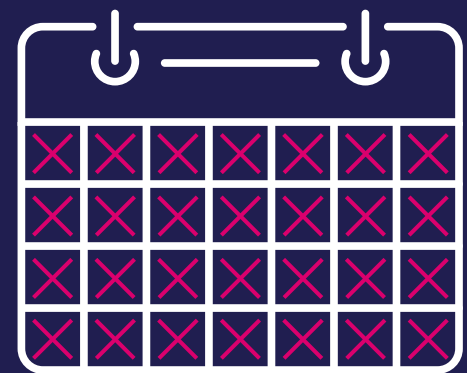
Once the paperwork was eventually completed, AMS's admin team then had to rekey all of the information back into the CRM — a tedious and time-draining task.

While AMS had previously implemented two different email-based eSignature solutions, their customers often didn't have an email address, or emails went to spam. And, when they did get the PDFs, they were not mobile-friendly or easily fillable on a smartphone.

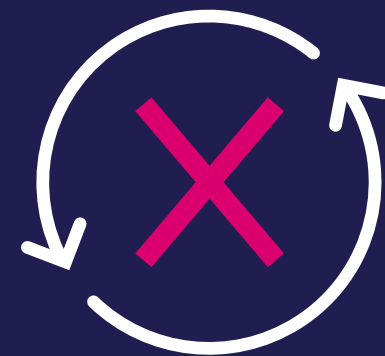
To ensure efficiency and ease of use for elderly clients, AMS needed a solution that integrated with their CRM and allowed clients to complete forms quickly, easily, and remotely — while on the phone with an agent.



Challenges



Slow
Turnaround
Times



Low
Completion
Rates



Frustrating
or Impossible
Customer Experience



Inefficient
Back End
Processes



Annual High Costs of
Hiring & Training of
Temporary Seasonal Staff

Solution

Easy, Intuitive & Guided eSignature Solution

After poor results with legacy email-based eSignature solutions, AMS implemented Lightico's intuitive, mobile eSignature solution and saw dramatic improvements.

The solution enables AMS's agents to collect information and signatures on Medicare forms via a simple text message sent to the customer's mobile phone by the agent during a call. Using Lightico's intuitive interface, customers can now easily complete and sign forms in seconds without waiting for emails, or using a printer, scanner or fax.

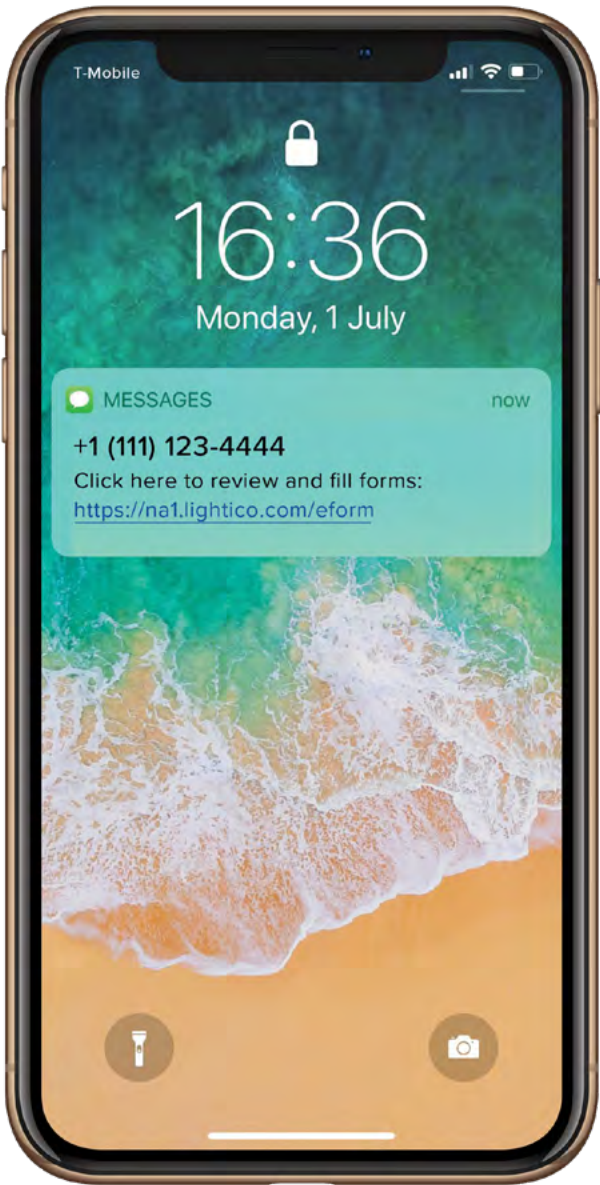
Since adopting the technology, customers complete forms and signatures remotely within minutes from their smartphone or tablets at assisted living residents.



Agents and customer service staff no longer have to spend their valuable time chasing missing signatures, physically visiting clients or reworking incorrectly completed forms and then inputting them into the CRM. They can concentrate their efforts on educating clients and making it as easy as possible for them to complete their paperwork.



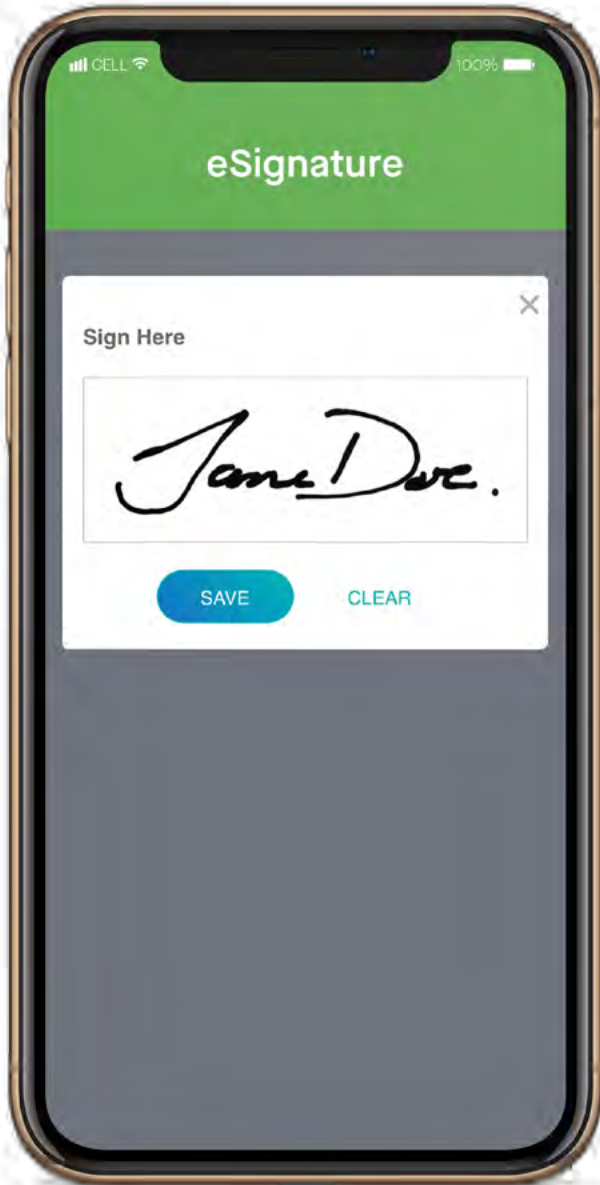
How it Works: AMS's Application Process



Agent sends a text message to the client containing a link to a Lightico session.



Client opens the link and instantly fills all relevant form fields.



Customer signs with an easy finger swipe.



2-Way data sync ensures that customer records are updated.

Business Impact

Thanks to the speed and ease of use of Lightico's real-time text messaging solution, **over 90%** of documents sent to customers via Lightico are completed by customers **within 10 minutes** of the initial request.

As a result, the enrollment process is more efficient, customers remain loyal and Affordable Medicare Solutions has strengthened its reputation as a leading medicare insurance agency.

The company is now looking into leveraging the Lightico's digital platform across other parts of its business.



“What would have taken two weeks, now takes 10 minutes on their cell phone. Clients and our Referral Partners love it - it’s an easy process instead of a daunting process.”



Ann Wilson
Agency Manager
Affordable Medicare Solutions

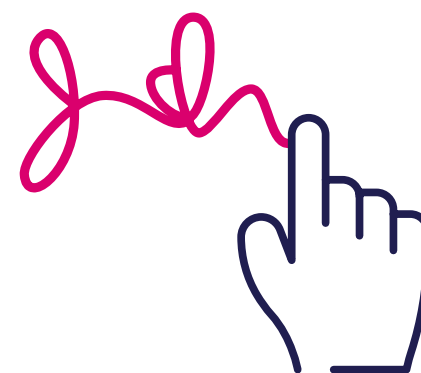


Key Results



**From 2 Weeks
to 10 Mins**

Reduction in Avg.
Turnaround Time

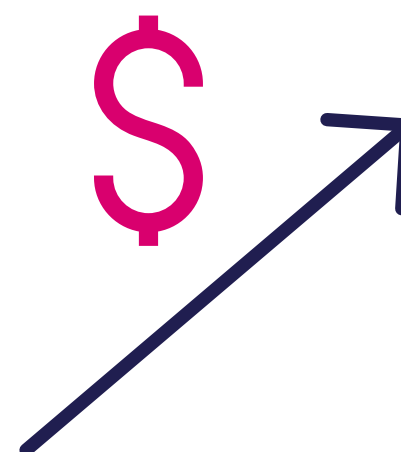


85%

First-Time
Completion Rate



**High
Customer
Loyalty**



More than \$25K

Agency Annual
Cost Savings



*“As an agency, we want to ensure that we help our clients make the daunting process of Medicare Enrollment as smooth and easy as possible. With Lightico, we’ve been able to transform a usually frustrating, time-consuming process into simple, quick finger swipes. **Our clients are happier than ever and our agents can handle the enrollment season smoothly and efficiently.**”*



Keith Nabb
President
Affordable Medicare Solutions

Now More Than Ever, Support Your Customers Remotely

Instantly collect eSignatures,
forms, documents & payments

[Request A Demo](#)



Lightico

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SUBMIT

About Lightico

Lightico digitally transforms connections between businesses and their customers, making the experience effortless, efficient, and unforgettable.

With Lightico, sales and service agents can instantly collect eSignatures, documents, payments, and verify ID in real-time, straight from customers' mobile phones.