

# COCO {Insurance}<sup>®</sup>

Discover insurance and financial product sales opportunities due to the analysis of transactional data.



# COCO{Insurance}<sup>®</sup>

Increase your sales personalizing your offer thanks to the analysis of the transactional data of your customers.

## User-centric offers

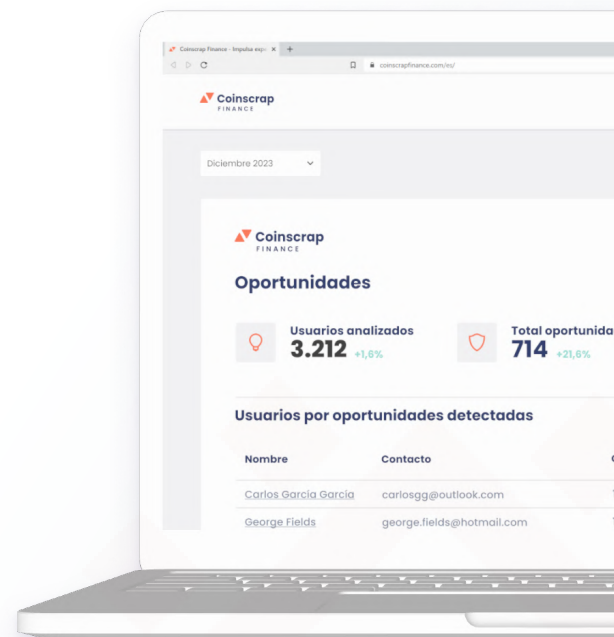
Successful business strategies are based on accurate information about customer needs.

### 01 Due to Open Banking

Users can connect their accounts to your digital platform and you will obtain in real time all the necessary information to generate hyper-personalized offers.

### 02 Better understand their needs

Generate up-selling and cross-selling due to the analysis of the consumption habits and financial health of your users.

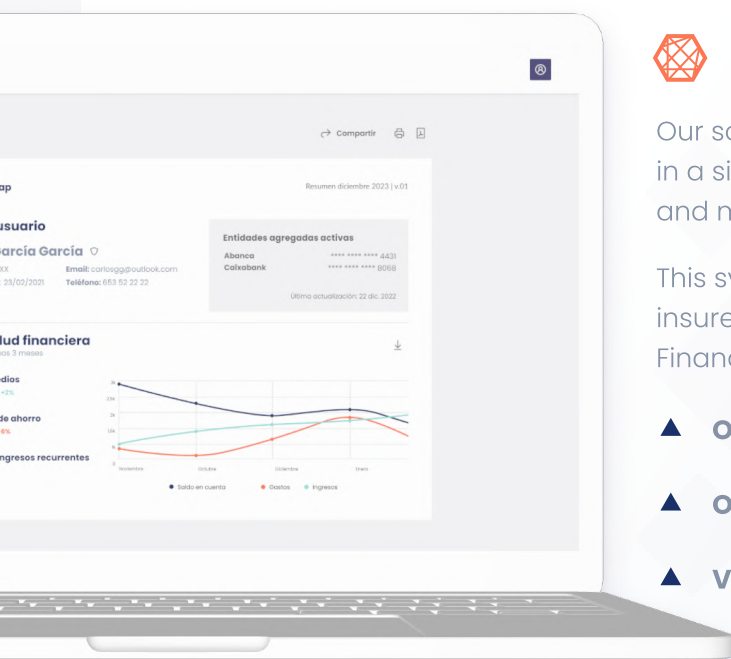


## A global coverage

Our software is integrated into the insurer's digital platform in a simple way and at a reduced cost. It is a totally flexible and multilanguage installation.

This system can be consumed through installation on the insurer's servers, from a private cloud or from the Coinscrap Finance cloud.

- ▲ On-premise
- ▲ On cloud
- ▲ Via SaaS



# How does it work?

Due to a totally flexible installation, you will achieve your goals in 4 easy steps:

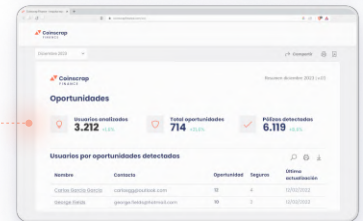
## 01 Bank aggregation

The user connects their bank accounts and all their information is added.



## 02 Categorize

**coco**{Insurance} analyzes transactional data in seconds to show a 360° overview of the customer's financial situation.



## 03 Enriches

**coco**'s categorization engine classifies and enriches the huge amount of information and transfers it to the personalized dashboard to improve business decision-making.



## 04 Decide

**coco**{Insurance} delivers an instant result of useful financial insights for future up-selling and cross-selling business strategies.



## Advantages for users and companies

Transform your customers' financial experience with **coco**{Insurance}. It offers a 100% digital and unified process, fair interest rates, personalized alerts and increases financial inclusion.

Boost your insurance company and make your customer base grow!

# 5

### New cross-selling opportunities

Discover new cross-sell opportunities with each insurance expiration-date identification due to our reports.

# 45%

### Precision

Identify family groups with one or more children and no life insurance at the time. Optimize your strategy and personalize your offer for each customer.

# 80%

### Satisfaction

Sales agents are "very satisfied" and consider it useful for the daily management of their customers.

Mapfre Financial Planner use case data.



Our customers and partners,  
our best testimony.



Backed by strong financial investors



## Harness the power of transactional data

Request a demo to discover the full potential of our solutions.



PFM designed for Mapfre Financial Planner®