



20%

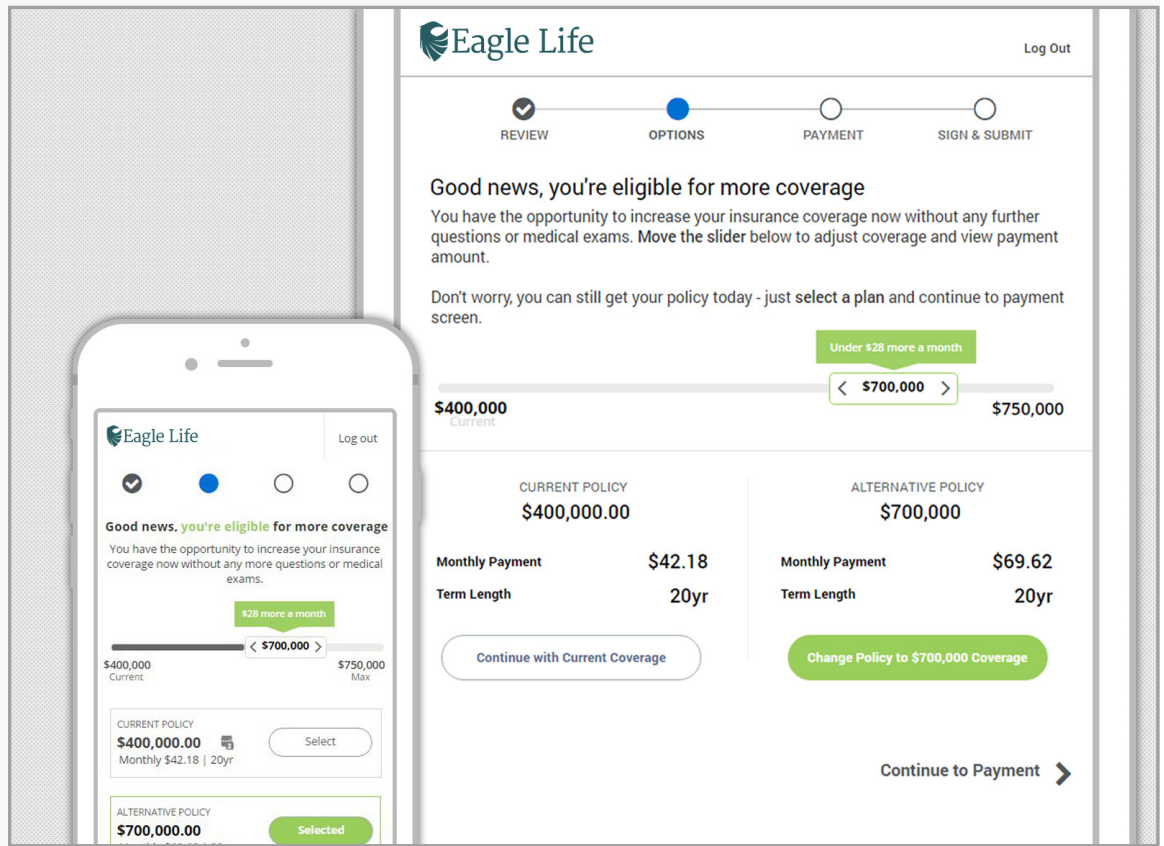
1 in every 5 policies are successfully upsold to a higher premium amount.

15%

is the average per policy premium increase.

DYNAMIC AMENDMENTS

Upsell your clients to higher premium amounts and make common policy changes without requiring a lengthy reissue process. DocFast's innovative Upsell feature automatically amends the policy and allows for immediate electronic delivery.



DOCFAST® FOR E-DELIVERY

NOW WITH IPIPELINE'S UPSELL FEATURE

DocFast®, iPipeline's e-delivery solution, is rapidly becoming the industry standard for streamlined and improved document delivery...but it's so much more than just an e-delivery solution! With the new policy Upsell feature, DocFast is positioned to drive revenue through increased premium collection.

PRE-APPROVED COVERAGE

Send your clients pre-approved coverage options that encourage policy upsell opportunities. Clients can increase their death benefit, change term lengths and even select payment modes in an intuitive user interface.

Premiums are automatically recalculated and policies amended without a lengthy re-issue process.

UNPARALLELED USER EXPERIENCE

Designed with the user in mind, agents and consumers can see several "what-if" scenarios in real-time by simply adjusting the death benefit amount along the slider.

The new Upsell feature encourages your clients to explore the immediate cost for increasing their coverage amounts with a simple and mobile friendly user interface.

UPSELL FOR AGENTS

This is an interactive agent sales tool that displays various coverage amounts available to their consumer. Agents can Upsell the policy to higher death benefits and even downsell for “other than applied” for scenarios.

[Agent side interface depicted in image to right]

UPSELL FOR CONSUMERS

Utilized by consumers during the policy signing process, Upsell allows consumers to make changes to their payment mode, term length and death benefit in a simple user-friendly interface.

[Consumer side interface depicted in image on front]

The screenshot shows a web interface titled "Eligibility Options". It features a slider that allows users to adjust the coverage amount from the current policy (\$400,000) to the maximum eligibility (\$750,000). The current selection is \$600,000. Below the slider is a table of alternative coverage options based on term length and payment mode.

	ANNUAL	SEMI	QUARTERLY	MONTHLY
10yr	\$1,102	\$432	\$286	\$48
15yr	\$1,574	\$617	\$409	\$69
20yr	\$2,248	\$882	\$584	\$98

PRODUCT CAPABILITIES & BENEFITS

- Increase revenue by driving additional premium collection
- Automatic policy amendments – No re-issue required!
- Real-time rate calculations
- Real-time payment mode changes (e.g. Annual, Semi-Annual, Quarterly, Monthly)
- Real-time term length changes (e.g. 10 year, 15 year, 20 year)
- Supports Agent and Consumer facing Upsell views
- Supports downsell for “other than applied” for scenarios