Product Recommendations

Every customer interaction is an opportunity to create value

Front-line teams focus on resolving the customer's immediate request. But while handling a billing question, policy change, or claim inquiry, opportunities to improve coverage, strengthen retention, or recommend additional protection are often missed, because finding the right recommendation requires analyzing customer context, eligibility, coverage details, life events, and business rules in real time.

Meanwhile, marketing and business teams can't manually design and maintain recommendation strategies for every product, persona, and customer situation.

Turning customer context into the next best action

Engage-It helps insurers scale personalized recommendations across products, customer segments, and channels. By combining product knowledge with internal and external data, it identifies the next best action and delivers it directly within the front-line teams' tools.

Recommendations are driven by customer context, policy information, life events, eligibility criteria, and business rules, not generic offers or one-size-fits-all campaigns.

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Extract & Structure
Turn product documents, policy guides, and business rules into governed product knowledge.

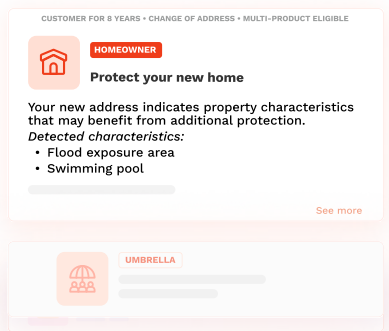
Personalize
Match product strengths, eligibility criteria, and customer context to identify the most relevant recommendation.

Activate
Surface the recommendation directly within the front-line teams' tools.

What does the advisor receive?

- → The **next best action** to take
- → The **context** behind the recommendation
- → The **product expertise** needed to **explain it confidently**

No generic offers. No missed opportunities.



Recommendations types

Cross-sell I Upsell I Retention & renewal actions I Prevention recommendations I Coverage optimization

Higher conversion, cross-sell, upsell, and retention potential	More relevant and contextualized recommendations	Improved customer satisfaction and service quality

Explore other Engage-It applications :

Glass claim automation I **Premium Explainability** I **Product Expertise at Point of Sale**

Learn more