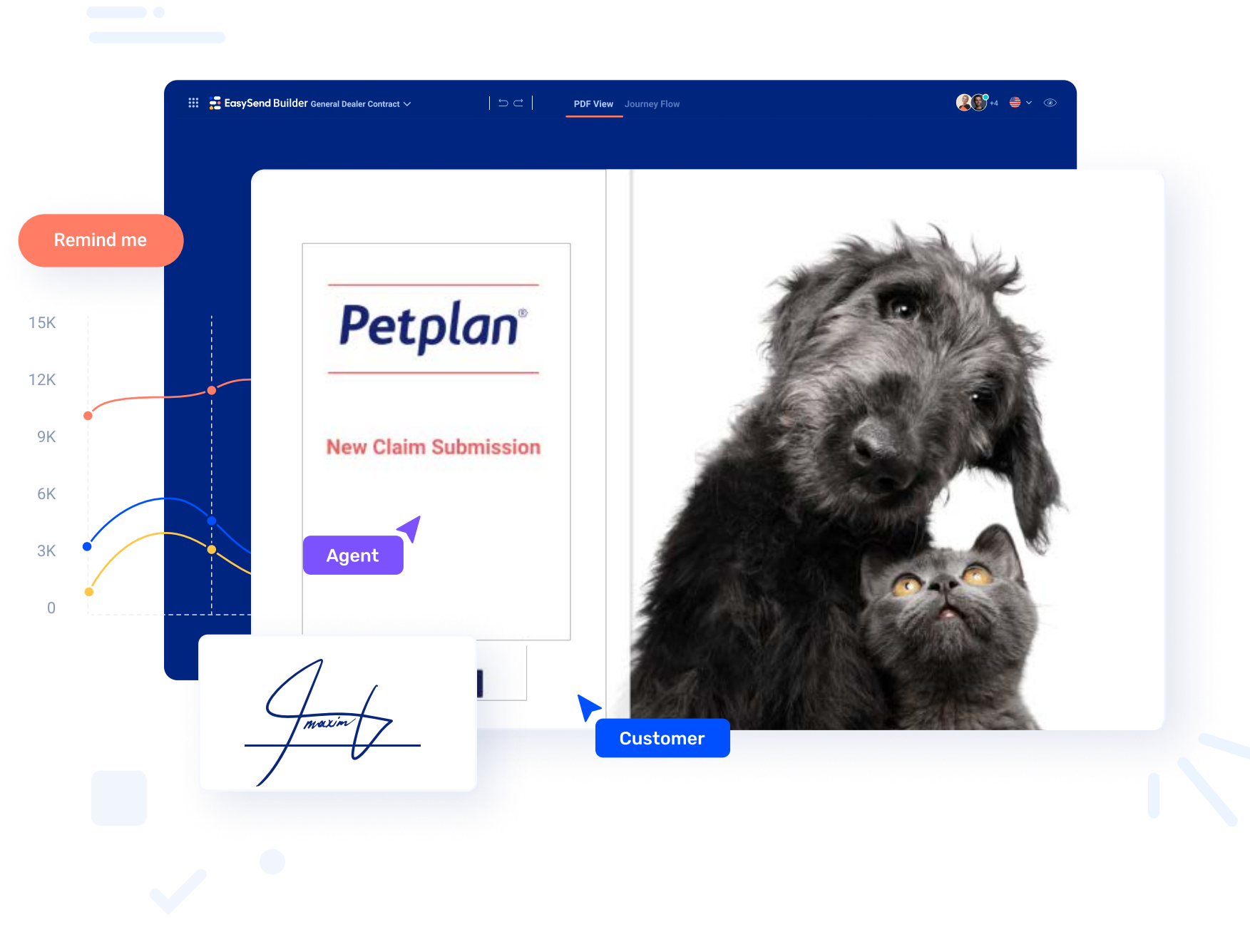


Petplan

Reducing labor costs by 15% in two weeks

EasySend's no-code platform made it possible to cut out manual labor and automate data collection. Now customers can submit any claim and supporting documents independently, which automatically updates their info in Petplan's CRM and cuts down claim processing by two days.



- ✓ Automated data collection & reduced manual labor
- ✓ Launched in less than 3 weeks
- ✓ Improved the experience for all users.
- ✓ Reduced life cycle by 2 days



"It was amazing. We went from verbal discussions to live with our first process in less than three weeks. It was so easy and fast. It was actually the fastest partnership integration project I've ever worked on. And I've been in this industry and call center management support for about 20+ years."

Chad Dull
Claims Director

Delivering friendly comprehensive coverage

Petplan is the industry's leading pet insurance company with over 40 years of global experience.

Striving to deliver the most comprehensive coverage available, Petplan covers over 10 different kinds of claims and promises to review all submissions within one business day.

- Industry**
Pet insurance
- Geo**
North America
- Digital journey**
New claim submission
Missing documents
- Feature highlight**
EasySign
Validations
Integrations
Journey Sender
Auto-emails
Themes

The mission: Simplify and streamline the process

Before working with EasySend, customers' had to manually fill out forms, scan each page, and submit claims via email. Naturally, this left lots of room for Petplan customers to make mistakes, add unnecessary info, or miss essential documents along the way—delaying claim processing.

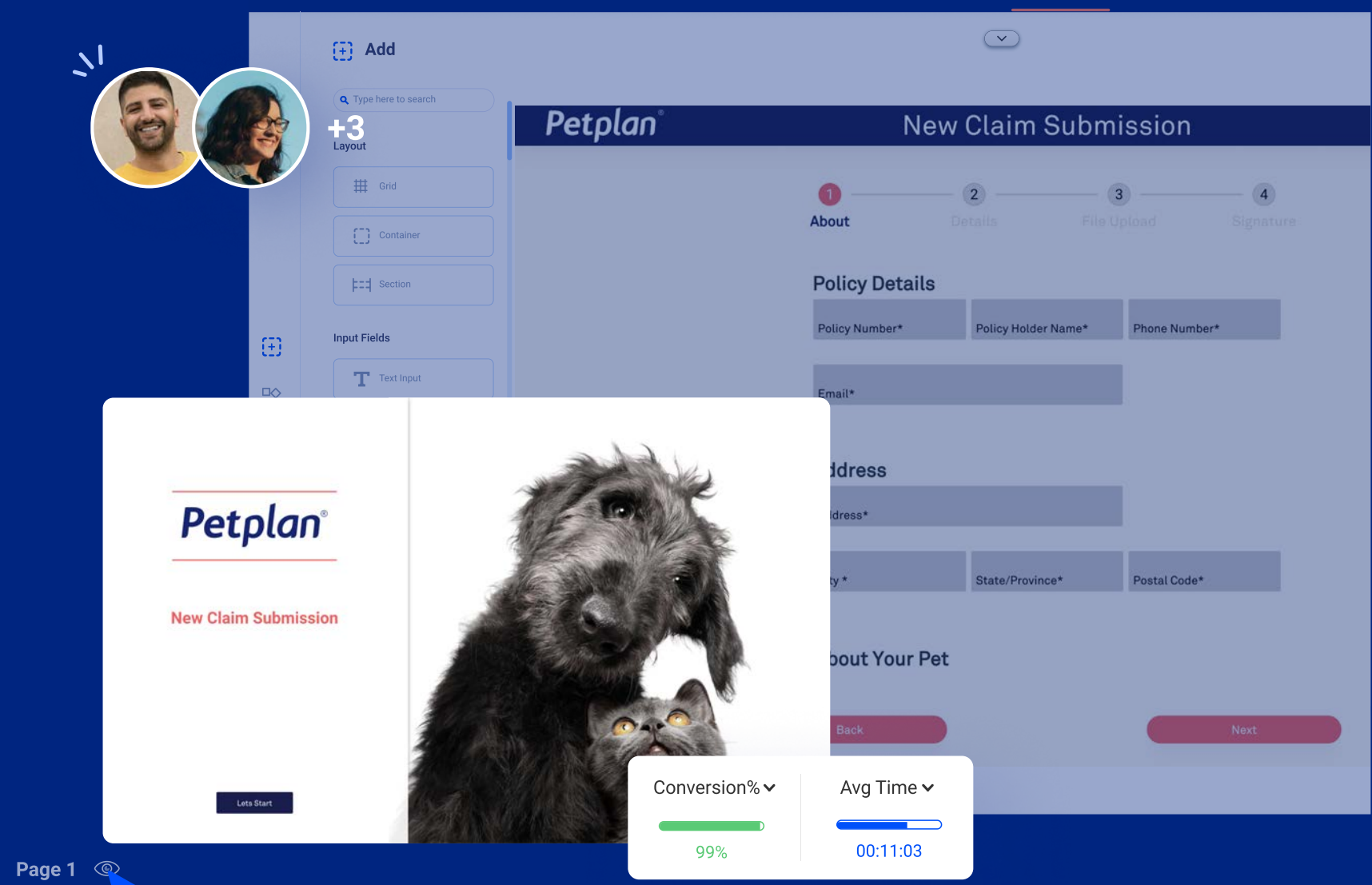
The solution: Automatically integrate data with their CRM

With EasySend, Petplan built a simplified digital journey with four short questions, streamlining the claim process and helping customers fill out the correct info. Data is automatically collected and updated in their CRM using a two-way integration, cutting down manual labor costs by 15%.

With EasySend, Petplan can quickly mark any missing documents so that customers can submit the remaining forms online without unnecessary emails. By tracking the journey along the way, employees can send reminder emails to help move the process.

Making life easier for everyone

- Simple submission process**
A personalized digital journey has reduced the claim life cycle by two days and cut down manual labor costs by 15%.
- Improved user experience**
Customers appreciate the simplified process, knowing they can quickly complete and send each claim.
- Improved company workflow**
Employees can support customers in real-time, making their job easier and more intuitive.
- Empowering self-service**
Customers can see which forms are missing and submit any documents without relying on back-and-forth emails.



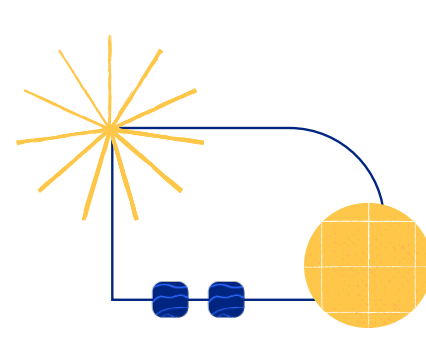
The power of EasySend at Petplan

Building • Communicating • Managing



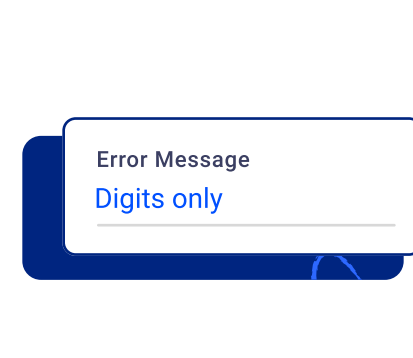
No-code builder

Petplan turned time-consuming hand-written forms into a simplified digital journey for claims and missing documents.



Integrations

By integrating their CRM, Petplan automatically collects data and updates their customer info.



Validations

Adding field validations helps customers fill out their info correctly the first time, cutting out back-and-forth emails.



Electronic signature

Petplan uses our electronic signature capabilities to make it easy to sign on any device.



Automated emails

Petplan automatically sends personalized emails to launch each journey or remind customers to keep going.



Journey Tracker

Employees can track each customer's process and see where they're getting stuck along the way.



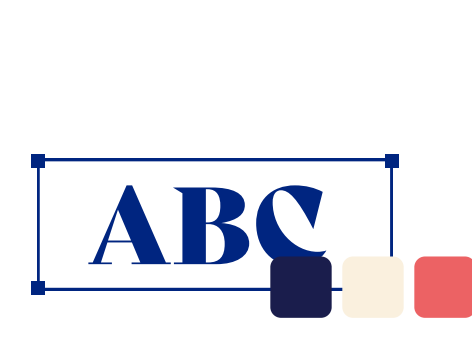
Journey Sender

Agents can pre-fill info and send digital journeys from one place without wasting time searching through old processes.



Co-Browsing

Petplan helps customers remotely by sharing screens and guiding clients through the digital journey in real-time.



Branded Themes

Every digital customer journey starts with a Petplan theme that matches their strong brand and can be reused for every process.

Drastic results immediately



"In the short time we implemented this process, it has drastically reduced costs. In two weeks we've saved 15% in labor costs associated with handling additional files by using EasySend."

Chad Dull
Claims Director

Start your digital transformation with EasySend

Ready to cut out manual tasks and thrive remotely? Our experienced team has created over 2000 digital customer journeys in the insurance, banking, and financial enterprise industries.

About EasySend

EasySend helps enterprises go digital at a fraction of the cost and time. With our no-code platform, transform any insurance, banking, or financial manual process into a digital customer journey in days. Learn more at easysend.io.



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