

# SMARTIQ™

## Modern Data Collection Delivers Accurate Data to You — and Revolutionary Experiences to Your Customers

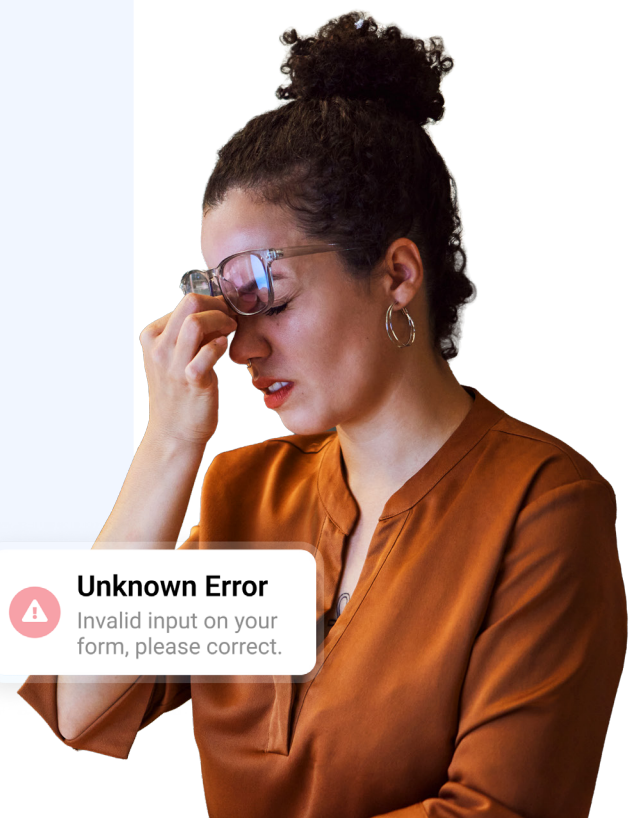


You're searching for ways to modernize the manual forms that jeopardize your relevance in today's world—because manual forms (and the back-office processes that go with them) are frustrating, inefficient, and inconvenient for everyone. And they hold you back from achieving bigger, more strategic business initiatives.

SmartIQ™ from Smart Communications is a cloud solution that does more than put forms online. Focused on meaningful impact, SmartIQ tackles the technical and process debts that come with forms—and it removes the plethora of pain they bring.

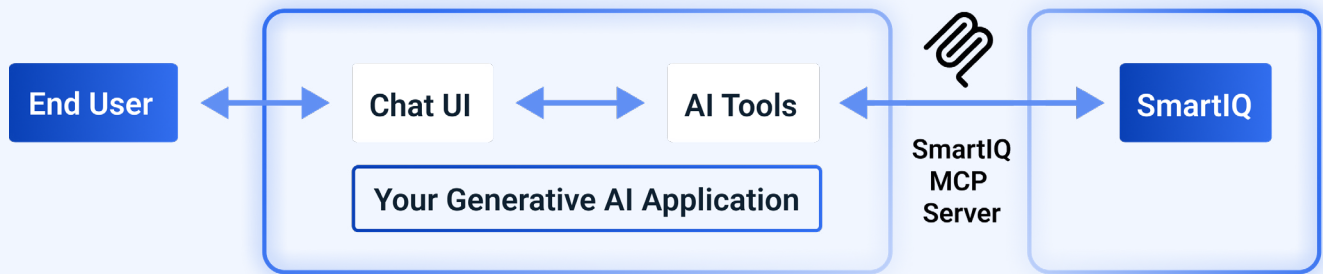
### Why Manual Forms are Bad for Business:

- Poor digital experiences reduce satisfaction
- Lack of channel choice alienates young consumers
- Manual data entry and approvals are inefficient
- Inability to share data limits customer transparency
- Backlogs drive calls
- Incomplete information delays business decisions
- Siloed data goes unused and ages
- Unreliable data limits critical business analysis
- Outdated technologies are expensive to maintain



## Support for AI Strategies: SmartIQ Agent

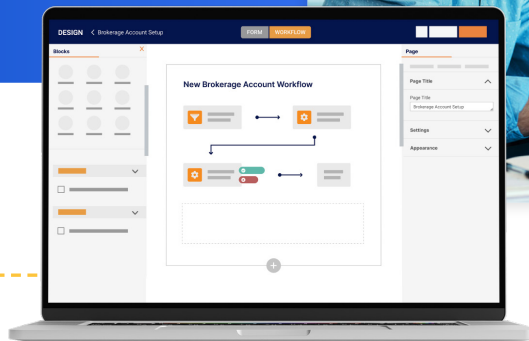
In addition to traditional digital channels like desktops and mobile devices, SmartIQ integrates with AI tools to deliver the agent experiences you want with the predictability you need—making AI agents a viable channel for collecting data. SmartIQ lets you couple your natural language models and agentic platforms with the independent business rules and data requirements of SmartIQ, to ensure predictable business outcomes.



## The SmartIQ Value Chain

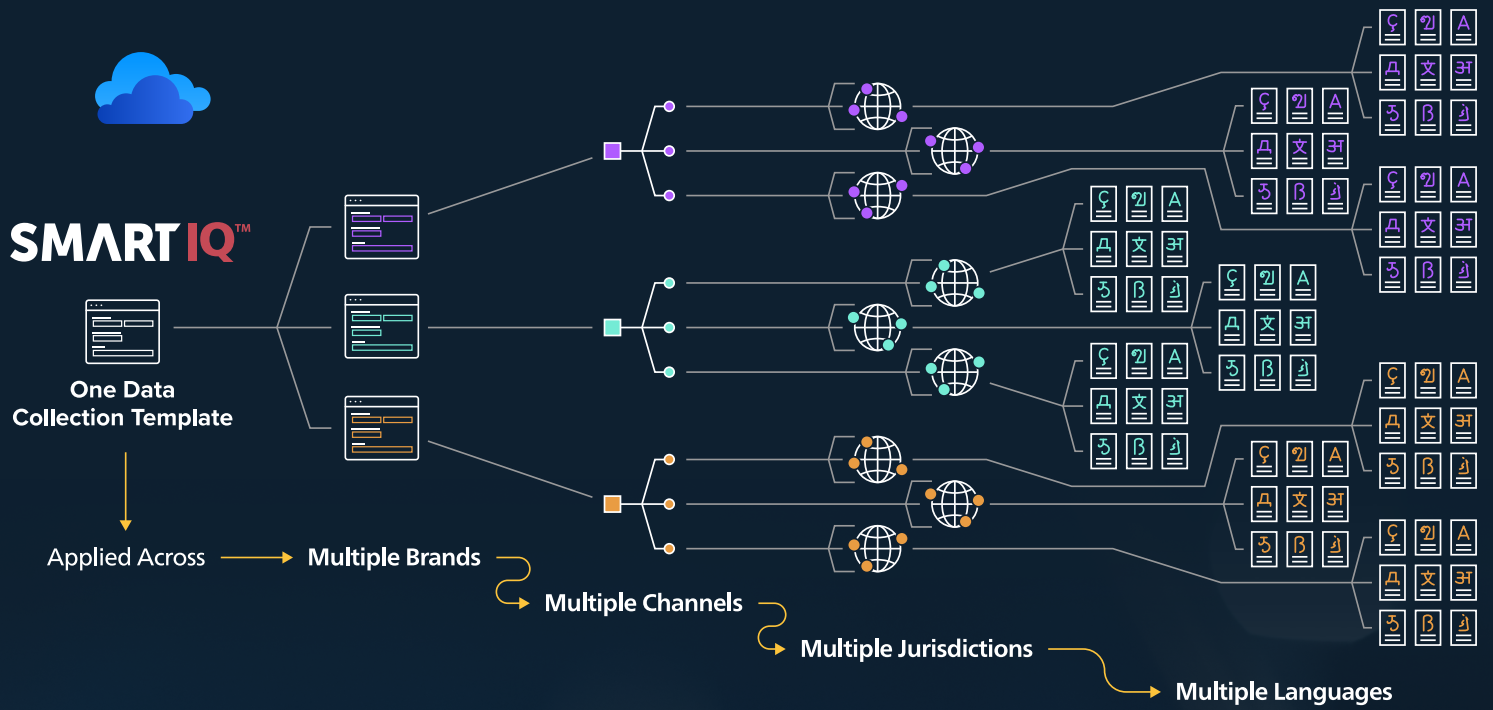
SmartIQ is built to support the most strategic initiatives for today's companies.

- **Standardize and consolidate** form technologies
- **Automate and digitalize** complex business processes
- **Improve data quality and reliability**
- **Share information** across the enterprise
- **Securely collect information** from outside the organization
- **Protect sensitive information** and ensure compliance
- **Business led automation**
- **Available on any digital channel**



## One-to-Many Channel Delivery

Forms need to represent different brands, be accessible on different channels (inside and outside the company), have different disclosures based on where they are being issued, and they need translating.



## Core Industries:



### Financial Services (Retail)

Financial Crime/Suspicious Activity, Loan Servicing, Mortgage Servicing, Account Opening, Tax Forms



### Financial Services (Wealth Management)

Account Servicing, Client Onboarding, Custodial Forms, Disbursement Requests, New Account Opening, Risk Assessments



### Insurance (Property & Casualty)

Supplemental Applications, Additional Information Requests, Field Underwriting, Policy Endorsements, Policy Renewals Information Requests



### Insurance (Life)

Applications, Supplemental Applications and Questionnaires, Beneficiary Management, Change of Individual Owner, Notification of the Deceased, Loan/Partial Surrender/ Dividend Withdrawal Request



### Health Insurance

Group Plan Design, Benefit Eligibility & Enrollment, Health Risk Assessment, Filing a Claim, Appeals and Grievances, Disenrollment, HIPAA Release, Member Service Requests, Prior Authorizations, Provider Onboarding and Renewals



### Health Provider

Patient Referrals, Scheduling, (Pre) Registration/Intake, Medical History, Consent to Treat, Patient Experience Survey, Coordination of Benefits/MSPQ, Financial Assistance Applications, Provider Contracting & Credentialing

### Beneficiary Change Form

Name \*

Jane Smith

Phone Number \*

555-555-1234

Email Address \*

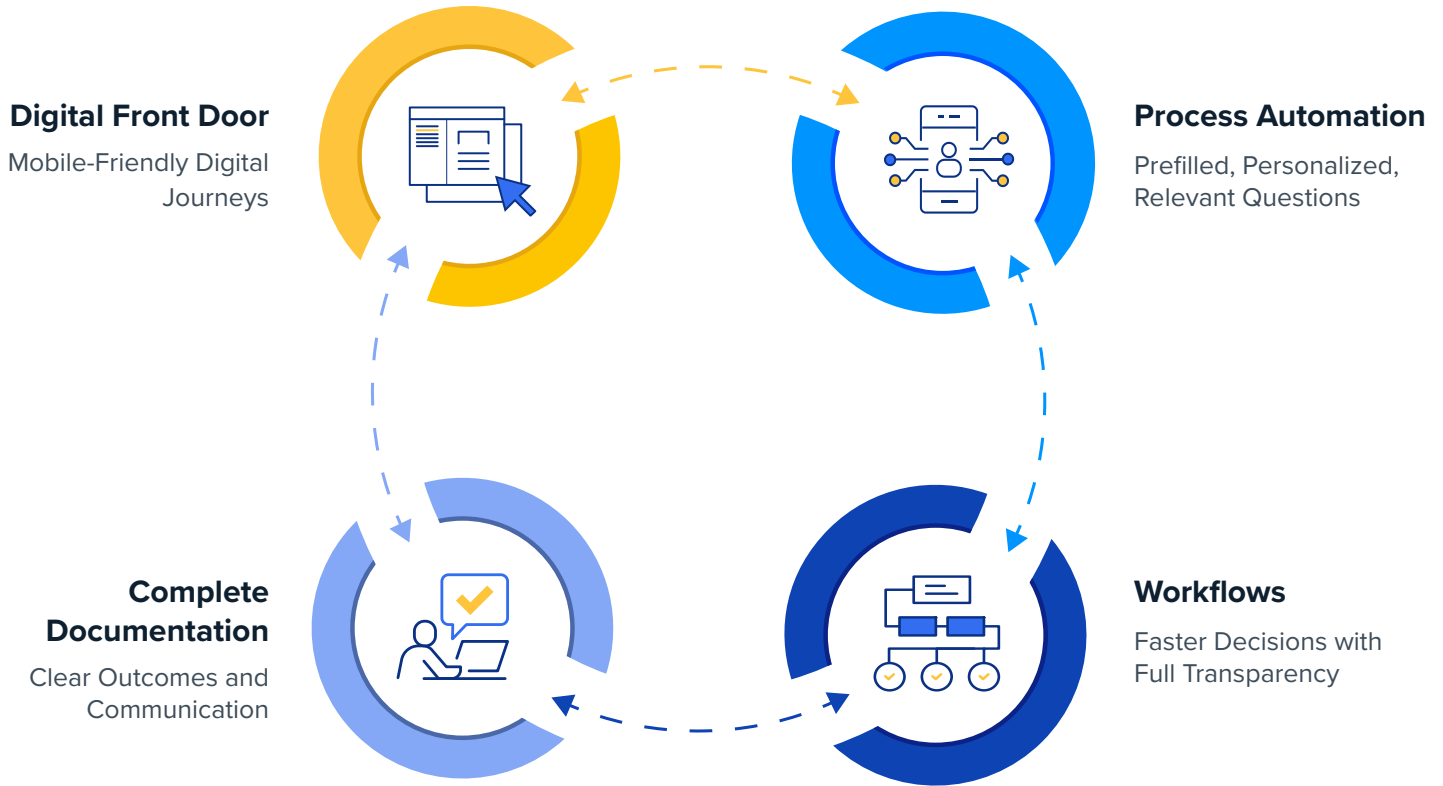
jane.smith@gmail.com

Relationship to the Insured

Daughter

# How SmartIQ Works

Strategic capabilities that deliver better data to you and better experiences to your customers and employees.



Discover how SmartIQ can help your company create efficiencies for today and form processes for the future. Contact us for a personalized demonstration today.

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UK: 03-452-412-339  
AUS: +61-1300-362-013



Smart Communications™ is the only provider of a customer conversations management platform. More than 700 global brands rely on Smart Communications to deliver smarter conversations across the entire lifecycle—empowering them to succeed in today's digital-focused, customer-driven world while also simplifying processes and operating more efficiently. This is what it means to scale the conversation. Smart Communications is headquartered in the UK and serves its customers from offices located across North America, Europe, and Asia Pacific. The Smart Communications platform includes the enterprise-scale customer communications management power of SmartCOMM™, forms transformation capabilities made possible by SmartIQ™ and the trade documentation expertise of SmartDX™. To learn more, visit [smartcommunications.com](http://smartcommunications.com).