

Myriad Life Insurance Support Model



**QuotaM Web:
New Business and
Alterations**

On the new platform help is a click away. On every screen on the new platform there will be an icon on the bottom righthand corner that can be utilized to initiate a conversation with a Support agent.

1. Initiate a conversation

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Initiate a conversation

At the bottom of the Quote Platform will be an icon indicating – Let's chat

- This will be the button that will initiate a ticket/conversation with the support team in real-time if an agent is available
- Expect an answer within 15 mins of logging a request, barring peak periods or during a system incident

What type of support you can expect here:

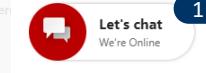
- How to navigate the screens
- Help on completing the quote
- Technical issues will be referred to the Production Support team for assistance, but this will be managed with the adviser logging the ticket and he /she will be kept in the loop or handed over to the relevant team

What this support team is not:

- A general service support team
- Product support team

Operating hours

- This is a live support system with extended hours for the early launch period – Sept - Nov
- 7 am to 7 pm excluding public holidays and weekends
- Tickets received after hours will be attended to the following business day



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The Chat box

The screenshot shows the Momentum Myriad Business application interface. At the top, there is a navigation bar with links: Home, My Clients, My Myriad Business, New Quote, and Admin. Below the navigation bar, the main title is "My Myriad Business". A search bar is present with the placeholder "Search by Quote description". A red callout bubble points to the "Let's chat" button in the top right corner of the interface. The interface displays a list of quotes, with one quote highlighted. The quote details are as follows:

Modified Date	Inception Date	Financial adviser	Total premium	Policy Holder/s:
2022/07/19	2022/07/19 (14:29)		R 173.78	
	2022/08/01			

Below the quote details, there is a section for "test alterations 1907" with the following information:

Momentum Interactive	Modified Date	2022/07/19 (14:03)
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On the right side of the interface, there is a "Let's chat" button with a message: "An agent will be with you in a moment." Below this, there is a text input field with a placeholder "Type your message" and a send button.

The chat widget will open when the icon is selected, here an adviser can have a conversation with the Support Agent

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Receiving links and articles (How to guides)

The support agent will also be able to add documents (PDF) and links to further articles with the adviser by placing it in the live chat box.

momentum Home My Clients My Myriad Business New Quote Admin

My Myriad Business

Search by Quote description

All Quotes Applications Submitted In Force

2022-07-19_14-25-50

Modified Date
Inception Date
Financial adviser
Total premium
Policy Holder/s:

2022/07/19 (14:29)
2022/08/01

R 173.78

test alterations 1907

Momentum Interactive

Modified Date

2022/07/19 (14:03)

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Let's chat — X

9:27 AM - Sent
svc- SupportAdmin has joined the conversation.

ss Hi there, how can I help you?

svc- SupportAdmin - 9:27 AM

I need help with booster features please

9:27 AM - Sent

ss Yes, sure would this document help?

ss Retirement booster.pdf

ss <https://app.knowledgeowl.com/kb/article-preview/id/6281424be0f35f001c1ca29c/aid/62a7278b04836b3efc550bd0>

svc- SupportAdmin - 9:31 AM

Type your message

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LifeReturns® Screening Support

Like on Quota M(web), during the screening process there is also a support team available to assist.

1. How to “Get help”

At the top of the screen on the righthand side is a button “Get help”, this button is available on various screens throughout the screening process

What to expect

Get help

1

Here's what to expect from the Kimi screening process



Identity verification

We need to do a liveliness check as well as verify your identity



Kimi health screening

We'll ask you a few health questions and do the selfie screening

Let's get started!

Myriad Life Insurance Support Model



LifeReturns® Screening Support

2. Support Channels Available

Once the button has been selected the adviser/client can select the support they want by either

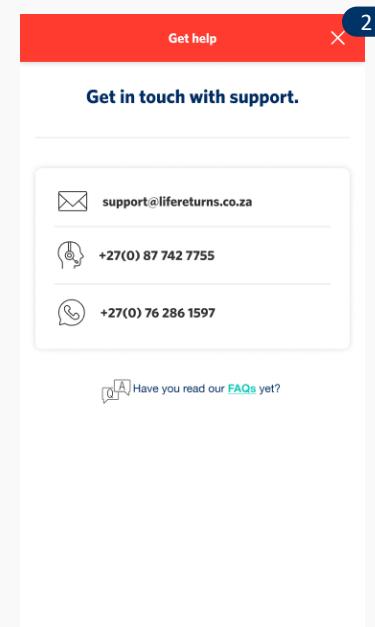
- Sending an email to (email address to be confirmed)
- Initiate a What's app conversation
- Read through FAQ documents

What type of support you can expect here:

- How to navigate the screens and complete the screening process
- Technical issues will be referred to the Production Support team for assistance, but this will be managed with the adviser logging the ticket and he/she will be kept in the loop or handed over to the relevant team

Operating hours:

- This is a live support system with extended hours for the early launch period – Sept – Nov
- 7 am to 7 pm excluding public holidays and weekends
- Conversations initiated after hours will be attended to the following working day



The screenshot shows a support interface with a red header bar. The header includes a 'Get help' button and a '2' notification badge. Below the header, a section titled 'Get in touch with support.' lists three contact methods: an email icon with 'support@lifeturns.co.za', a phone icon with '+27(0) 87 742 7755', and a phone icon with '+27(0) 76 286 1597'. At the bottom of the interface, there is a question 'Have you read our [FAQs](#) yet?' with a small icon.

Myriad Life Insurance Support Model



LifeReturns®
Screening Support



1. Selecting WhatsApp

Once the WhatsApp button has been selected, WhatsApp will open and the adviser/client can initiate a conversation with the Support agent