

# 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

**momentum**

Home My Clients My Myriad Business New Quote Admin



### My Myriad Business

Search by Quote description



X Clear

Please type in Quote description to search on

Create quote

All **Quotes** Applications Submitted In Force

2022-07-19\_14-25-50

New Business quote: 752476071902

Modified Date 2022/07/19 (14:29)

Inception Date 2022/08/01

Financial adviser [REDACTED]

Total premium R 173.78

Policy Holder/s: [REDACTED]

test alterations 1907

Alterations quote: Incomplete

Momentum Interactive

Modified Date 2022/07/19 (14:03)

Policy number: 209753103

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Let's chat  
We're Online

1

# Myriad Life Insurance Support Model



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 working day

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Home My Clients My Myriad Business New Quote Admin

My Myriad Business

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All Quotes Applications Submitted In Force

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Momentum Interactive

Modified Date

Financial adviser

Total premium

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Let's chat  
We're Online

1

# Myriad Life Insurance Support Model



The Chat box

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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Home My Clients My Myriad Business New Quote Admin

## My Myriad Business

Search by Quote description

Please type

All Quotes Applications Submitted In Force

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Policy Holder/s:

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Momentum Interactive Pol  
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Let's chat

An agent will be with you in a moment.



Type your message



# Myriad Life Insurance Support Model



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.

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Home My Clients My Myriad Business New Quote Admin

## My Myriad Business

Search by Quote description

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Momentum Interactive Pc  
Modified Date 2022/07/19 (14:03)  
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Let's chat

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/628f424be0f35f001c1ca29c/aid/62a7278b04836b3efc550bd0>

svc- SupportAdmin - 9:31 AM

Type your message

# Myriad Life Insurance Support Model




## 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 

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**Here's what to expect from the Kimi screening process**



**Identity verification**  
We need to do a liveness 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


**Get help** 2

**Get in touch with support.**

 [support@lifereturns.co.za](mailto:support@lifereturns.co.za)

 **+27(0) 87 742 7755**

 **+27(0) 76 286 1597**

 Have you read our [FAQs](#) yet?

# 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

