

DATE:	June 4, 2018	N° 2018-11
CATEGORY:	INSURANCE	
TO:	Managing General Agents, Associate General Agents, Advisors, General Agents and National Accounts	
SUBJECT:	Announcing free integrated co-browsing the Fast & Full Life Application	

Introducing free integrated co-browsing - the latest enhancement to the Fast & Full Life Application Process resulting from feedback from our advisors. For Non-Face-to-Face sales using the Fast & Full Life Application, advisors must use screen sharing of the web browser session in real time. Now, advisors can use our new integrated co-browser functionality.

Features

Benefits of Co-Browsing include:

- Allows clients to participate in completing the application and view progress.
- Reduced margin for error in the application process as you guide clients through each step. Ability to switch control between client and advisor in real time
- Web based and integrated directly into Fast & Full - no additional software installation needed.
- Eliminates the possibility of inadvertently sharing other windows or applications.
- Initiate a video chat for a more personal NFTF client meeting

How has Fast & Full changed?

How to initiate a co-browsing session

Advisors now have the option to start co-browsing for NFTF sales in Step 1: Preliminary info.

1. Advisor selects "Non-Face-to-Face" option in the "My client(s) and I are meeting" section.
2. Advisor must confirm use of co-browsing technology that allows proposed owners and life insured to view the advisor's screen at all times during the application and advisors have the option to give their clients control of their screen.
 - Advisors may still choose to use other screen sharing tools such as Join.me or WebEx.
3. A confirmation box for co-browsing will appear and advisor can click on "Start Co-browsing".
4. A green "You are now in control" notice will appear at the top of the page.
5. To invite clients to the unique co-browser session, advisor can either (1) copy link to clipboard or (2) invite client by email.
 - The unique session code can also be emailed and shared to invite more than 1 person.
6. Client inserts unique URL into a new browser window or clicks on the session link via email.
7. Both the advisor and client are notified when a new "Follower" has joined the session.
8. Advisor moves through the application process in real time with the client viewing the advisor's screen. Advisor can switch control to the client to complete certain parts of the application (eg. payment information) and can direct client's attention to areas of the screen by drawing on screen with a "marker".
9. Once the application has been completed, the co-browsing session automatically ends.

How co-browsing works

How to switch control between advisor and client:

1. Advisors select the hand icon to "switch control".
2. "Switch control" box pops up and gives advisor option to select which of the users in the session can take control. Clients are identified in this session as Follower 1, Follower 2, Follower 3, etc.
3. A green "[Follower 1] is now in control" appears at the top of the page. Both the advisor and client are notified when a new user takes control of the session.

How to initiate video chat between advisor and client:

1. Select "join video chat" icon on the bottom right hand corner of the control box.

2. Client and Advisor need to enable the usage of microphone and camera by clicking "Allow".
3. The video chat starts and a video session window will appear above the control panel.

How to upload a client's document

Advisor directs client to select the "share a document" icon at the bottom right hand corner of the control box.

1. Client needs to locate and select the electronic file and click "open".
2. A green box will appear at the top of the screen indicating "file uploaded" and the document will then show on screen for both the client and advisor screen.
3. Advisor and client can then choose to review the document together. The advisor has the option to click on the download icon and save the document. Please note only advisors can upload attachments to the application.
4. To return to the application process, advisor can click on the first tab in the co-browsing session. Advisor may also choose to click on the x to close off the attachment in the second tab.

How to restart co-browsing session

In the event the application is not completed during a co-browsing session, advisor needs to go to their My Clients Dashboard in Fast & Full, locate the customer name and click "resume application". This will lead to the application page where the advisor and client left off. Advisor must click on the "restart co-browsing" button at the top right hand corner of the page and repeat the steps to initiate a co-browsing session.

Other Details

Co-browsing will work on all modern browsers: Chrome, Firefox, Safari, Internet Explorer 10+, etc., as well as on mobile Android devices using the Chrome browser and Safari on Apple iOS devices.

Launch Date

Co-browsing will be available for NFTF Fast & Full Life Applications beginning: **June 4, 2018**

Reference

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