

Achieving a 360-Degree View of Insurance Customers

Case Study | Customer Experience

AN INTEGRATED CX SOLUTION THAT REDUCED INSURANCE QUOTE TIME BY 60%!

Mastech InfoTrellis recently helped a leading South American Insurance company reduce the time needed to quote auto insurance from 25 minutes to 10 minutes. The company provides risk-management solutions for individuals and companies, and Mastech InfoTrellis designed its client data forms to deliver a 360-degree view of each customer. The solution enabled them to provide personalized service tailored to the individual needs of their customers quickly and efficiently.

THE CHALLENGE

The client created a contact center for its automotive insurance operations to provide high-quality and consistent customer service. The center had many responsibilities, including providing immediate answers to questions about insurance policies and the application process. However, they used disparate systems to keep track of insurance sales, resulting in a less than ideal Customer experience with limited reporting capabilities. The company had to integrate data from the three systems to determine how many sales calls were logged in a month. In addition, it was impossible to know if a customer called on a single issue more than once because there was no history of client complaints. Tracking customer interactions and ensuring appropriate and timely follow-up was extremely difficult.

THE SOLUTION

The client required a single solution that could provide a 360-degree view of each client to resolve concerns while enabling all contact center agents to engage in sales activities. MIT designed its client data forms in Oracle CX Cloud to deliver a complete view, including past insurance policies and insured vehicles. The solution provided the necessary information to the sales and consulting teams to respond to client inquiries and facilitate policy sales accurately.

THE OUTCOME

The Mastech InfoTrellis solution optimized the productivity and efficiency of contact center agents by providing them with rapid access to accurate and complete customer data. The solution:

- Increased revenue by equipping sales and consulting teams with the information needed to accurately respond to client inquiries and facilitate policy sales
- Reduced the time taken to accurately respond to client inquiries and facilitate policy sales
- Reduced the time needed to quote auto insurance from 25 minutes to 10 minutes by integrating Oracle CX Cloud with the company's central insurance quoting tool
- Reduced the use of e-mail exchanges between insurance sales consultants and supervisors, improving the ability to keep customers' information updated, deliver faster responses, and boost sales proficiency
- Improved customer service by enabling supervisors to track the performance of each consultant and drive continuous learning with command boards for contact center managers