



Large U.S. Multi-line Insurance Company Integrated Agent Desktop Improves Front Line Customer Service Levels

Overview

Industry

Multi-line Insurance

Challenge

- Improve customer satisfaction
- Improve customer service
- Improve agent and CSR productivity

Solution

- 4,000 agents, 10,000 assistants and 500 CSRs use Integrated Agent Desktop
- Integration to 21 external systems including telephony, customer data hub, policy claims, billing, quotes, and application systems

Results

- Improved front office productivity by delivering a comprehensive view of all customer data and interactions from a single integrated desktop
- Provided coordinated, more efficient service across all channels, helping to drive customer loyalty and improve the customer experience
- Reduced agent desktop applications from 15 systems to 3, with planned integration to 18 external systems and 16 web services

Our client is a large mutual property/casualty insurance company in the United States with over 16 million customers. Our client has over 500 customer service representatives (CSRs) handling hundreds of thousands of interactions per month on matters that include direct sales, after sales support, and claims reporting.

Complex & Inefficient Systems Impair User Productivity

The collection of systems the agents and CSRs were using to engage with clients was overly complex and inefficient. It represented a patchwork of several data stores and independent software applications used to view customer information. Data was difficult to access and often out of date. In order to make a simple address update, for example, users would need to access information from as many as 15 different systems and enter updated data into multiple locations.

Due to user accessibility constraints, customer service was impaired; agents and CSRs were less productive and were often frustrated with having to navigate multiple systems. Training new employees was also a challenge because of the varied user interfaces and commands for each system.

In order to deliver a consistent customer experience, improve agent and CSR productivity, and provide better tools to manage the agent's business, the client understood that they needed to consolidate their agents and CSRs onto a single Integrated Agent Desktop. It was important that the system seamlessly integrate with multiple back office systems, be flexible and scalable to support rapid growth into new markets and geographies, and have a user interface that was customer centric and intuitive to use.

Simplified Access to Customer & Third-party Data across the Firm

After careful consideration, the client selected NexJ Systems to provide an Integrated Agent Desktop solution to deliver core customer relationship management (CRM) capabilities combined with insurance-specific functionality tailored for agents and call centers.

NexJ's solution was seamlessly integrated to more than 20 internal systems, including telephony, customer data hub, policy claims, billing, quotes, and application systems. Specific systems include Versata Distribution Channel Management, Guidewire Insurance Suite, Microsoft Exchange, Informatica MDM, WebSphere, Workforce Management, and i3 Interactive Intelligence. Today, the Integrated Agent Desktop provides users with seamless access to 16 million customers, 10 million households, and 50 million addresses, phone numbers and email addresses from one unified desktop interface.

Keeping track of customer interactions is now straightforward, with NexJ's Integrated Agent Desktop serving as the client's interaction hub. All customer interactions and important system notifications link to back office systems and are recorded in the Customer Journal. This allows employees across channels to view any household interaction such as a quote, endorsement, service request or claim and deliver improved customer satisfaction.

There were two notable differentiators in NexJ's offering that stood out for the client. First, NexJ's solution provided industry-specific functionality tailored to the client's unique environment and aligned to user needs. This included automated caller ID that presents CSRs with a profile of the caller, from which applications, quotes, or any other service or sale workflow can be instantly initiated. Second, NexJ's model-driven engineering platform allowed the client to virtualize data from multiple, disparate systems thereby leaving all customer profile data in place – with no replication required. With data shared across all systems, adding or updating customer information is now easier than ever; data is entered in once and it is shared across all systems automatically. What was previously a complex system of disconnected silos of information is now transformed into a household-centered view

NexJ Systems will enable the insurance company to provide its agents and CSRs with a comprehensive view of all customer data in a single, easy-to-use interface.

of clients and prospects, providing users with seamless access to a complete view of customer policies, claims, billings and applications from a single desktop environment. NexJ's Integrated Agent Desktop serves as the primary access point from which policy agents and CSRs conduct their day-to-day business.

Results: Improved Front Line Customer Service Levels

Since the initial roll out, the agents and CSRs are more productive and can service customers more effectively, navigation to data is simplified, duplicate entry has been eliminated and there is an increase in "once and done" calls with prospects and customers. Seamless access to customer and third party data from a single Integrated Agent Desktop has improved user productivity, and sharing customer data across all channels and lines of business has enabled a consistent customer experience across the firm. Embedding workflows to automate existing business processes, like lead management, have made staff more productive and more responsive to customers.

Future Plans

The client currently has 600 agents and CSRs using the Integrated Agent Desktop. This number will expand to 5,000 in 2012 and 10,000 in 2013. The final stage will see the entire population of 17,000 agents, assistants and CSRs across all of the client's distribution channels using NexJ's Integrated Agent Desktop solution, which will integrate 49 systems, including EDMS and analytics from Business Objects.



NexJ Systems Inc.

10 York Mills Road, Suite 700,
Toronto, Ontario M2P 2G4

P: 416 222 5611 F: 416 222 8623
info@nexj.com www.nexj.com

About NexJ Systems

NexJ is a provider of cloud-based software, delivering enterprise customer relationship management (CRM) solutions for the financial services, insurance, and healthcare industries. Our next-generation, people-centered software combines industry-specific functionality with information from multiple applications and data stores to provide comprehensive knowledge of the individual or patient. Organizations use this knowledge to provide superior sales and service by enabling proactive interactions that influence behavior.

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