

Customer Insights **Quick Start** for Insurance Carriers with Captive Agents

As an insurance carrier with captive agents, you understand one thing: If they don't sell competitively, your company suffers. But the challenge lies in how to help them be as productive as possible—to get the most return out of every minute of their time. And there is also your direct sales team. How do you support their efforts?

Building “Predictive” Relationships

The answer: Providing agents with the ability to gain actionable insights. These insights will help them uncover opportunities for cross-selling and upselling as early on as possible so they can take action. Rather than waiting for a phone call from the customer, they are armed with the insights they need to make the first move, eliminating the risk of dissatisfied customers or worse—customers lost to another carrier that was more proactive.

Agents need the ability to:

- Mine and analyze data from multiple sources (including social media) about anything that might be impacting their customers (economic conditions, world events, etc.), so they can correlate trends with potential recommendations and product offerings
- Monitor potentially catastrophic events so they can proactively reach out to insureds, limiting your risk of exposure
- Set triggers to ensure action is taken on trends or other events, so they—and their customers—never miss an opportunity

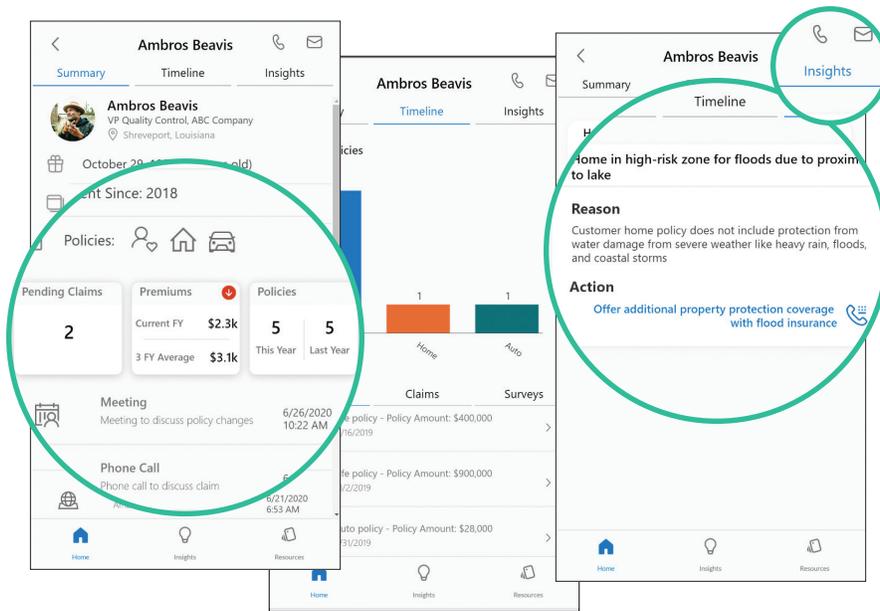
Getting that data is not a problem, but how do you turn it into actionable insights? Microsoft Customer Insights adds a value layer to any CRM to consolidate data from anywhere, including back-office applications, social

1.5 Day Quick Start

Goal: Help you take the first step towards a customer data-driven strategy

- Introduces the concept of a Customer Data Platform (CDP) strategy
- We will connect with your team to discover the basic elements you need to know about your clients and where your client data is today
- We will then work together on a Customer Insights prototype dashboard using your data to demonstrate its potential and ease of implementation

media, or other sources, without the need for significant integration or development. Customer Insights then applies artificial intelligence (AI) based on your parameters and triggers to give agents access to predictive information that will transform their relationships with their customers.



Benefits: Empowered Agents, Loyal Customers

- By getting in front of all the relevant data—regardless of source—your agents become strategic advisors, not just order takers.
- Agents stay on top of their customers’ trending ideas, empowering them to change transactional relationships into true partnerships.

With Customer Insights, your agents—and their customers—will never miss an opportunity. That’s how to win a customer for life.

1.5 Day Quick Start

Our Offering Includes:

- Discovery workshop to understand your client data and what is important for your organization to know about them
- A Customer Insights prototype dashboard in a sandbox environment, including:
 - Sample data uploaded from up to 2 sources using Excel-based sources
 - Configuration of basic customer profiles and measures using the data sources and data elements identified during the discovery workshop session
 - A walkthrough of the Customer Insights dashboard

Resources and Pricing

The engagement will include a Customer Insights Architect and a Financial Services practice specialist.

Price: US \$5,000



the results company

Empire State Building
350 5th Avenue, Suite 6902
New York, NY 10118
T (212)502-3900 | info-usa@hso.com