



the results company

SERVICE BRIEF | Financial Services

Customer Insights **Proof of Concept** for Insurance Carriers with Non-Captive Agents

As an insurance carrier with non-captive agents, you depend on high-performing producers. You want to help them to continue performing, but there are challenges. First, you need to identify your top producers. Second, you need to support them in their efforts to recruit new brokers and agents while competing with other carriers going after their channel. How do you do it?

Building “Predictive” Relationships

You need insights into performance and other key indicators to identify top producers, and they need insights to uncover opportunities as early on as possible so they can work proactively with their channel, rather than reacting. If an agent representing another carrier gets to those customers first or offers a better policy, they will take that customer from you.

Agents need the ability to:

- Gain insights into brokers, agents, and opportunities so they can determine the next best action to take
- Follow up on illustrations that are most likely a solid fit for so they can spend their time focusing on business they’re most likely to win
- Get in front of all the relevant data—regardless of source—so they can beat other carriers to the punch with better offers
- Set triggers to ensure action is taken on trends or other events, so they never miss an opportunity

The problem is that, while there’s plenty of data to be had, wrangling it into actionable insights is a different story. CRM software cannot deliver predictive insights—but Microsoft Customer Insights can. It adds a value layer to any CRM that consolidates data from anywhere, including

2-Week Proof of Concept

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

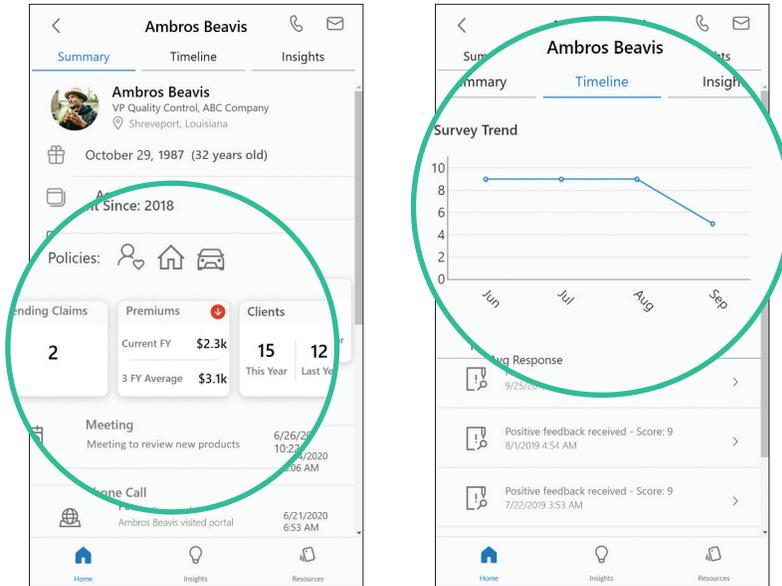
- Introduces the concept of a Customer Data Platform (CDP) strategy
- We will connect with your team to discover the basic elements you need to know about your clients and where your client data is today
- We will then work together on a Customer Insights prototype dashboard using your data to demonstrate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

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Gold Cloud Platform
Gold Cloud Business Applications
Gold Cloud Customer Relationship Management
Gold Enterprise Resource Planning
Gold Application Development

back-office applications, social media, or other sources, without the need for significant integration or development efforts. It then applies artificial intelligence (AI) based on parameters and triggers to give them access to true, predictive insights that will give them the confidence to take the next best action and not miss another opportunity.



Benefits: Empowered Producers, Channel Growth

- Identify and target your top-performing producers so you can focus resources on staying top of mind, ensuring they’re offering your proposals to their customers
- Keeping your top producers performing with data and insights that make them strategic advisors that keep customers for life

2-Week Proof of Concept

Our Offering Includes:

- Discovery workshop to understand your key customer data indicators, and what would entail to combine them into a single view, where you can identify the KPIs and metrics that are critical for your organization
- A POC deployment in a sandbox environment, where you can discover the potential of a Microsoft Customer Insights implementation. This will include:
 - 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
 - Configuration of a basic PowerBI dashboard with up to 2 different views

Resources and Pricing

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

Price: US \$19,000



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