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INSURANCE
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Becoming My Customer

How Data Helps Transform The Journey



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Claims Journey

- The average client has a claim approximately every 10 years
- As a trusted advisor, we have the ability to set expectations for a client before the journey begins



Actions

- We started tracking claims calls and reason for call and established that 80%+ were due to lack of communication
- We laid out a strategy to set expectations, contact client at appropriate variables and get ahead of as many of the communication issues as we could

Results

- Our internal claims NPS reached 98, when before we brought in an in-house claims rep we were sitting below 70



Renewal Process

Research

We analyzed how many renewals we rewrite and tracked the average % increase that was causing our clients to reach out.

Actions

- We implemented quoting parameters and customized the contact email based on thresholds being met
- Tailored messaging to the likely action or concern of the client

Results

- Our internal retention rose from 92.1% to 93.9% over 12 months
- Efficiency allowed us to change role of 1 of the 4 team members handling this task