

Becoming My Customer

How Data Helps Transform The Journey



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



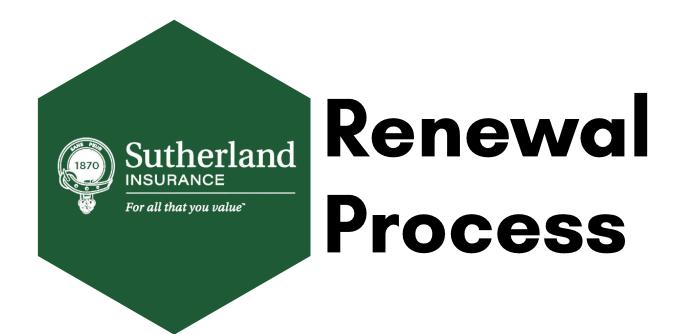


Actions

- 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



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