

# MANAGING SALES & SUPPORT

A leading insurance broker needed a solution to reach out to their prospects on calls and manage customer communication received on email.

## Challenges

They deal with B2B as well as direct B2C business

The business had a team of agents who used to take care of the support and the sales process on calls. The process involved reaching out to prospects who had participated or shown interest in the product across multiple marketing events / campaigns. They had very limited engagement on their social media pages.

The data used to get managed on spreadsheets. Customers also reached out to them to resolve their queries over calls and emails. The query resolution used to happen across departments over email communication.

The process had gaps in tracking and accountability resulting in delayed resolutions, missed opportunities and poor customer experience.

## Key Objectives

- To manage sales opportunities.
- To add new sales channels.
- Deliver better service to customers
- Improve overall customer experience

# The Solution

An omnichannel approach was needed.

They implemented CircleOne with the primary intent to consolidate client interactions onto one application. The modules used:

- Telephony
- Email Ticketing
- Omnichannel chatbot
- Process Automation

They used the dialer functionality in CircleOne to reach out to their prospects. Every call was tagged and there was clear visibility of the outcome of the calls made. The reports gave the management clarity on the effectiveness of various campaigns.

The chatbot on the Facebook page engaged with the prospects to handle product enquiry and schedule appointments for the sales team. The leads get allocated to the sales team in CircleOne.

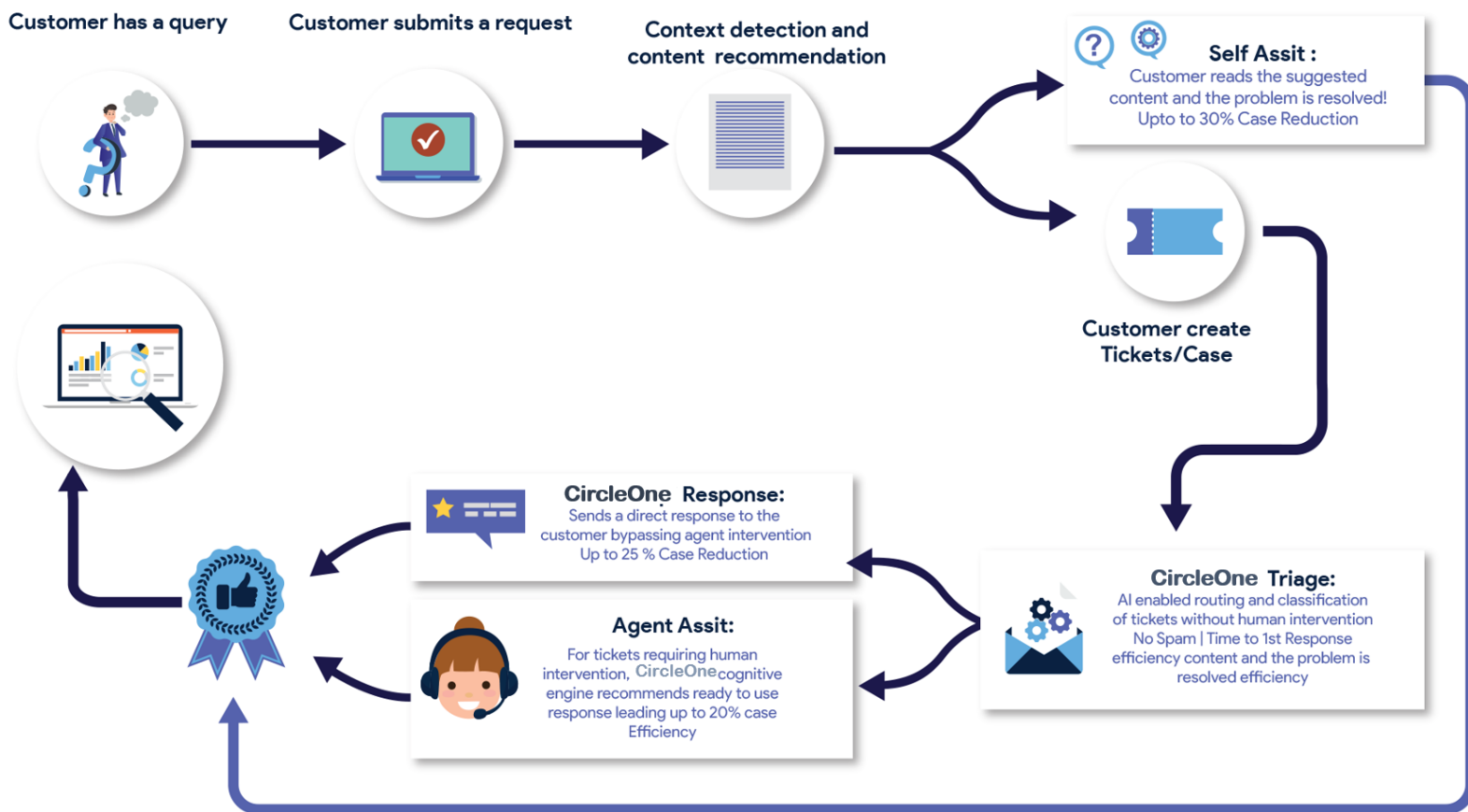
As a part of the POS agent on-boarding the KYC data extraction from the documents and the verification was fully automated.

The support team also managed to convert calls and emails to tickets. The pre defined workflows ensured that the tickets were routed to the right teams for resolution. With the reports and dashboard, the management can identify the reasons for delays in the process. Tighter SLAs has also brought in better control and improved customer experience.

## Results

- *Reduced agent effort : Multiple channels on a single interface*
- *Client onboarding and after sales support managed on the same application*
- *Visibility of the customer journey with unified history of the client across channels.*
- *Organized and controlled process with predefined workflows, service levels and escalation mechanism.*

# Process Flow - Support Process Automation



The Bot was implemented in the PINC app to augment the customer support process. The customer could get immediate resolution for most of the queries. In exceptional cases the ticket is created and routed to the agents in CircleOne.

This has ensured round the clock availability of support to the customers and faster turn around for standard queries.

## Highlights

- 25% improvement in agent productivity.
- 30% reduction in resolution time.
- Improved customer satisfaction due to faster resolution of queries