

Overview

The client is a leading life insurance provider with its core strength lying in Marine insurance and liability, Travel Insurance and General Insurance. Known for its innovative approach to digital solutions and customer-first policies, the company is spread across 221 locations. Our client entrusted us to enhance their sales and service capabilities, creating a customer-centric future that delivers superior sales performance.



Objective

Improve sales quality, ensure compliance and drive digital enablement by optimizing operations and delivering seamless, omni-channel customer interactions.

Business Challenges

Struggling with fragmented data and inconsistent technology, the client faced growing roadblocks in maintaining policy accuracy and delivering meaningful customer interactions. Gaps in training, resource misalignment, and limited customer insights further eroded their service efficiency. Their primary obstacles were:

- **Policy Sourcing & Information Inaccuracy:** Incomplete sourcing of policies, not meeting customer needs
- **Inconsistent Customer Engagement:** Lower customer interactions and ineffective guidance.
- **Sales Support Gaps:** Inconsistent guidance and delays in addressing customer queries hindered effective resolution

The Solution


Aligning with the client's requirements, we tailored a Quality Support and Performance Management System. Our solution integrated support channels including calls and chat, utilizing technologies such as IPDS, Genesys, and the Mandatory Checklist Portal. This approach refined the Inbound and outbound call processes with a two-layer quality check system, performance tracking, and self-evaluations. With an aim to drive continuous improvement, we implemented consequence management for lower performers while providing additional support to top performers.

Value Delivered

By implementing the quality management system, we improved our client's sales performance and customer experience. This improvement was supported by a robust quality control framework, along with performance tracking and coaching to raise the standards of employee performance and customer experience.

99.8% Quality sales score reached

99% Compliance attained

 Optimized manpower utilization

Business Benefits



Sales Quality Optimization



Compliance Adherence



Continuous Performance Improvement



Effective Resource Utilization