



Best Strategic Project
Technological Innovation



Case Study

Tranquilidade

Lifetime Partners



The image shows a modern office environment with several cubicles. Each cubicle is equipped with a desk, a computer monitor, and a black office chair. The office has a clean, professional look with light-colored walls and desks. There are decorative elements like stars on the walls and a large screen displaying the company logo. The lighting is bright and even.

TRAN
QUILI
DADE

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Case Study: Tranquilidade

Challenge

Finding a solution that would allow autonomy to parameterize and define the business, independent from the IT. Adapt the IVR to the needs of customers and the evolution of the business. A user-friendly platform that operators and management could handle more easily, with more effective management of breaks and enhanced control and monitoring of the operation. Equally important was the ability to operate in a stand-alone manner.

Solution

Implementation of the GoContact platform with Omnichannel vision, adding to the Chat and WhatsApp channels more self-service services for customers, with the launch of a Virtual Assistant in the IVR. Activation of an intuitive platform that provides full parameterization autonomy, with dashboards and real-time reporting for performance control. The GoContact platform is fully integrated with the Salesforce CRM.

Results

Improvement of efficiency and service times with reduction of browsing time by customers in the IVR, reduction of transfers between service queues and the availability of new ways of communication with customers, allowing to solve their questions using a self-service system.



“Service and interaction with the customer are the grounds of the quality of services and based on the various communication channels that Tranquilidade provides to its customers and partners.”

Tranquilidade a partner for life

Founded in 1971, Tranquilidade offers its private and corporate customers the most appropriate insurance solutions for each phase of its life and has more than 2,500 agents across the country.

Tranquilidade wants to be a partner for life to its customers, with simpler and more innovative products and services and easier and faster ways of relating to customers, such as the App, the Website or WhatsApp.

In 2020, Tranquilidade became part of the Generali group, one of the largest insurance groups in the world, with access to more comprehensive insurance and innovation solutions, increasing its capacity to support customers in our country.

Lifetime Partners The importance of a Contact Centre for Tranquilidade

Contact centres are vital for the insurance sector. Service and interaction with the customer are the grounds of the quality of services and based on the various communication channels that Tranquilidade provides to its customers and partners.

“The use of insurance is something that you never want to become a reality. As the popular saying goes: “better be safe than sorry” (However, for the sake of clarification, in Portuguese it is usually said in a literal translation “safety died of old age”). However, it is inevitable to be close to the customer in the post-sale phase, with the Contact Centre as one of the preferred channels”, says Ana Pinto, Director of Customer Service.

In this sense, the Contact Centre becomes essential for the provision of an excellent service, creating more interaction empathy in difficult times, solving the reasons for calling and adding value to the customer.

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“Our strategy is to build relationships for life (Lifetime Partners). When our customer or someone contacts us, we want this moment to be a good experience, regardless of the channel they use. We want to be close to our customers in a facilitating role in any situation they need”, says Ana Pinto.

Self-service without losing focus on interpersonal relationships

With the goal of creating relationships with its customers for life, Tranquilidade, being aware that speed and simplicity are pillars for the excellence of its service, invested on the availability of communication channels with self-service options that allow customers to solve their issues.

They implemented channels such as Chat and Whatsapp and in the voice channel “we took a chance on a Natural Language IVR, in which the customer simply verbalizes what he wants and is served by a Virtual Assistant. They are the foundations for satisfying the needs of our customers, guaranteeing good experiences in their interactions with the Company”, says Ana Pinto.

Nowadays there is a range of technologies that support various services and processes, So, Tranquilidade feels the obligation to use them and make them available to its customers and partners.

Now they are investing in Bots, Machine Learning, Natural Language Processing, Artificial Intelligence, automation but always with a focus on experience and interpersonal relationship with the customer, adjusting communication and making it more human and closer.

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Green Card Service and GoContact

In a simple and fast approach, Tranquilidade offers yet an additional green card sending service through the GoContact platform. This service was developed to facilitate and streamline the response to customers, and to reduce the occupation of assistants.

In this way, the customer calls the line and a Virtual Assistant requests the taxpayer number. Upon receipt of the taxpayer number, the Virtual Assistant informs that the green card was sent by email and ends the call.

After implementing this service, Tranquilidade stated that “we have a growing success of 53% in sending green letters and 95% in the automatic identification of the customer’s intention” Said Ana Pinto.

Payment service by ATM Reference and GoContact

This is another service where the GoContact solution was important. In this case, the customer calls the Company, states that he wants ATM references for payment and the Virtual Assistant asks for the policy number. After receiving this number, he informs that the ATM references were sent by email or SMS and ends the call.

As with the Green Card service, Tranquilidade has a growing success of 42%, keeping the same performance in the automatic identification of the customer’s intention.

“The operational management of the team is now much easier, and they can react more quickly to the fluctuations”

The impact of Contact Centre software for Tranquilidade

The greatest urgency of the Company was to create a self-service format for customers. They believe that a more simplified approach generates a good customer experience with the Company. They started by providing simpler services, such as sending the green card and moved forward with the development of more complex solutions based on customer feedback, for example, the request for policy cancellation for justified reason.

The GoContact platform allowed more agility and speed in the management of the operation. The operational management of the team is now much easier, and they can react more quickly to the fluctuations they register throughout the working day, with the autonomy to change queue operators, with or without service priority, as well as other service profiles and skills.

The supervision and coordination team has also recognized that the platform is an asset in the daily management of the operation.

In addition to all this, they have also been able to improve NPS and reduce calls answered by operators.

“Tranquilidade wants to continue to increase the services provided with the GoContact platform, especially regarding artificial intelligence”

The Future with GoContact

Tranquilidade wants to continue to increase the services provided with the GoContact platform, especially regarding artificial intelligence:

- Managing new needs in a responsive and fast way, such as the creation of new service lines in times of pandemic
- Provide a 24/7 customer service
- Increase self-service services, that is, increase the number of automations
- Start using biometrics

Customer Testimonial



"The launch of a Natural IVR was held in March 2019. The fact that we were the first in Portugal to start this format was very challenging and ambitious. These were moments that led us to think about how the customer would like to be served and in what way. This challenge is permanent and continuous. Our ambition is to closely monitor the needs of customers and the evolution that society imposes on the individual"

Ana Pinto – CDSC – Customer Service Management



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