

Case Study



Generali
Lifetime Partners



Generali is a major player in the global insurance industry, a strategic sector of great importance for the growth, development, and well-being of modern societies.

Case Study: Generali

The Challenge

Finding a solution that provides enough autonomy to parameterize and define the business without needing an advanced IT team. Adapt the IVR to the evolving needs of clients and the business. Implement an easy-to-use, user-friendly platform that operators and supervisors can use to efficiently manage breaks and enhance the monitoring of operations. Equally important was the platform's ability to operate on a stand-alone basis.

The Solution

Implement the GoContact platform with omnichannel vision, which provides total autonomy in parameterization, along with dashboards and real-time reports to help control performance, and Chat/WhatsApp channels with self-service resources for customers. The GoContact platform is also fully integrated with the Salesforce CRM.

The Results

Improved efficiency and service times with reduced navigation time by clients in the IVR. Reduced transfers between service queues and the ability to offer new forms of communication for clients, including resolving their questions using a self-service format.

Generali — A Partner for Life

Generali enables people to shape a safer future by caring for their lives and dreams. The Generali Group is one of the most significant players in the global insurance and financial product market. The Group is based in Italy, and Assicurazioni Generali, which was founded in 1831 in Trieste, is the Group's parent and principal operating company.

Characterized from the very beginning by a strong international outlook and now operating in more than 50 countries, Generali has consolidated its position among the world's leading insurance operators. They have significant market shares in western Europe, particularly in Germany, France, Austria, Spain, Switzerland, and Central and Eastern Europe.

Over the last decade, the Group has set up offices in the main markets of the Far East, most notably in India and China. After just a few years in operation, China has become the leader among insurance companies with foreign equity interests.

This project was implemented in a Generali sub-brand called Tranquilidade.

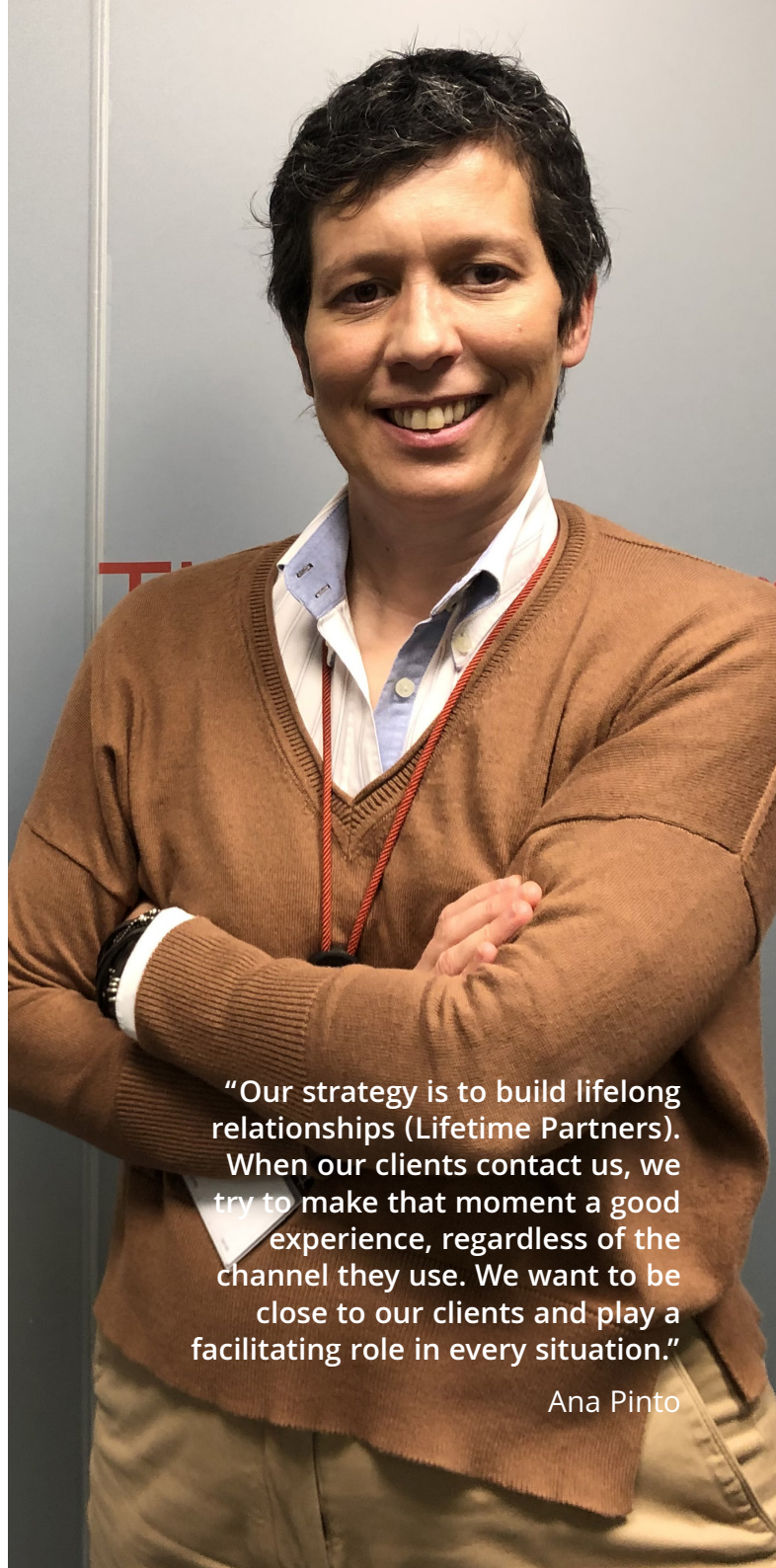
Lifetime Partners — The Importance of a Contact Center in the Insurance Sector

In the insurance sector, contact centers are vital. Customer service and interactions are a fundamental part of the quality of service and are based on the different communication channels that Generali has available for its customers and partners.

“Using insurance is something you never want to see happen, but it is always important. Furthermore, it is inevitable to be close to the customer in the post-sale phase, which makes the Contact Center one of the preferred channels,” says Ana Pinto, Director of Customer Service.

Therefore, the Contact Center becomes essential in providing excellent service, creating an empathic interaction in difficult moments, successfully resolving the reasons for the call, and giving more value to the client.

“Our strategy is to build lifelong relationships (Lifetime Partners). When our clients contact us, we try to make that moment a good experience, regardless of the channel they use. We want to be close to our clients and play a facilitating role in every situation,” says Ana Pinto.



“Our strategy is to build lifelong relationships (Lifetime Partners). When our clients contact us, we try to make that moment a good experience, regardless of the channel they use. We want to be close to our clients and play a facilitating role in every situation.”

Ana Pinto

Self-service Without Losing Focus on the Interpersonal Relationship

With the goal of creating lifelong relationships with customers, Generali's Tranquilidade brand is aware that speed and simplicity are pillars for excellent service in making communication channels available with self-service options that allow customers to resolve their reasons for calling on their own.

With added channels such as Chat, WhatsApp, and the voice channel, "we have a natural language IVR in which the client simply verbalizes what they need and is helped by a Virtual Assistant. It is the basis for responding to the needs of our clients and guaranteeing good experiences with their interactions with the Company," says Ana Pinto.

Today there is a range of technologies that support various services and processes, so Generali feels obliged to use them and make them available to their customers and partners. They are currently investing in technologies that will allow them to focus on the client's experience, develop interpersonal relationships with the client, and adjust communications to make them more human and relatable.

International Insurance Certificate Service and GoContact

Generali has an international Certificate of Insurance delivery through the GoContact platform. This service was developed to facilitate and speed up the customer response time and reduce the number of attendees.

In this way, the client is able to call the number, and a Virtual Assistant asks for the DNI number. After receiving the DNI number, the Virtual Assistant informs the caller that the certificate has been sent by email and ends the call.

“We have increased our success in sending certificates by 53 percent, and we are 97 percent successful in identifying the client’s intent.”

After implementing this service, Tranquilidade affirms, “we have increased our success in sending certificates by 53 percent, and we are 97 percent successful in identifying the client’s intent.”

Payment Service with Bank Reference and GoContact

This is another service where GoContact was important. In this case, the client can call the company and say they want the references to make the payment, and the Virtual Assistant asks for the policy number. After receiving this number, it informs the caller that the reference number has been sent by email or SMS, and the call ends.

As in the certificate service, Generali has seen a 42 percent increase in the success of sending reference numbers and maintained the same performance in the automatic identification of the client’s intent.

The operational management of the team is now much easier, and managers can react more quickly to fluctuations throughout the workday.

The Impact of Contact Center Software on the Business

The greatest challenge the company faced was to create a self-service customer service format. They believe that a more streamlined approach leads to a better customer experience. They started with simple services, such as sending international insurance certificates, and have progressed to more complex solutions based on customer feedback.

GoContact has allowed us to obtain more agility and speed in managing our operations. The operational management of the team is now much easier, and managers can react more quickly to fluctuations throughout the workday, with the autonomy to change work queues with or without priority attention, as well as other profiles and care skills.

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

In addition to all of this, the positive results of implementing GoContact have been:

- Navigation time in the IVR was reduced by 42 percent
- The Customer Service team gained 9.6 percent of installed capacity through the implementation of self-services, which facilitated the management of new business challenges
- 97 percent of intentions are correctly forwarded to the appropriate help lines, reducing mistaken transfers when choosing traditional IVR options
- Customer NPS went from 34 in June 2019 to 44 in June 2021
- The work capacity of customer service teams has increased by 10 percent
- The evaluation of care has increased by 0.6 percent

Customer Testimonial

“The launch of the ASR Natural was in March 2019, and its implementation did not lead to thinking about how the client would like to be served and in what way. Thus, we launch ourselves into this challenge that is now constant 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





broadvoice

www.broadvoice.com

About Broadvoice:

We are a growing cloud based communication company with a passionate team on a mission to inspire meaningful human connections. Our goal is to personalize the way we communicate so that no matter where work happens, our technology helps people be brilliant about the way they connect.