Spotlights

Customer 360° & Agent 360°
Wiener osiguranje

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Please briefly describe the initiative.

During the analysis of the main issues among our colleagues, we often received similar responses and identified the main issue: Due to multiple systems and applications, users were unable to quickly and easily access timely data about their portfolio. Driven by the desire to ease the daily work of our end-user and to reduce the pressure on Administration, we wanted to create a single place where they could access important data about their portfolio.

In the next step, we identified the information that was important to our end-user and we saw the solution in the implementation of new modules that would contain all the essential information in one place for easier daily work. This led us to the creation of the Customer 360° and Agent 360° modules.

What were the benefits?

We live in a time when it is extremely important to quickly and easily access information, and with the Customer 360° and Agent 360° modules, we enabled the Sales Agent to do just that, while simultaneously removing some of the burden from employees in administrative.

<u>Customer 360°</u>

In one place, the end-user can view a complete profile of the client. Some of the key functionalities within the Customer 360° include an overview of all the client’s policies, all claims - active and inactive, correspondence communicated to the client, as well as insight into the client's payments, that is, access to their invoices and bills. With this module Agents can identify the client's actual needs and offer them personalized proposals. In the end this leads to satisfied clients who receive comprehensive service.

<u>Agent 360°</u>

With the development of the Agent 360°, we enabled the end-user to have a complete overview of their portfolio and business on a single screen. Agent 360° makes it easy for them to have insight, from the office or on the field via their mobile device, into, for example, newly reported claims of their clients, upcoming policy expirations, progress of their sales plan, commissions, business compliance, and other important information, allowing them to do their job more effectively and efficiently.

Who were the main stakeholders involved?

This project was executed by a team from the Sales Department, with substantial assistance from other departments across the company, such as IT, Non-Life, Life, Premium Accounting, Controlling departments, all with exceptional support from the Management Board.

What were the major learnings and challenges you had to overcome?

In the beginning, the biggest challenge was identifying the exact needs of the end-user. Through various workshops with end-users, we recognized what troubled them the most, what data was most needed, and how we could help them the most. Due to the many systems in place, the challenge was to unify the data display in one place.

Our goal was for the modules to be user-friendly and not overloaded with the large amount of data we have in our systems. By implementing the Customer 360° and Agent 360°, we simplified the daily operations of our Sales team, given the easier and faster access to information, thereby also reducing the burden on the administration by decreasing the number of daily inquiries from Agnets.
The greatest satisfaction comes from the fact that by listening to different sides – Sales and Administration – we created a useful and simple tool that helpes resolve everyday tasks.

Going forward, what are your plans to further develop the project?

We continue to listen, take notes, and talk daily about the new needs of our users. Every day we are doing our best to improve the usefulness of the implemented modules and the overall user experience (UX).

Are you interested in exchanging with Ivana, please feel free to contact her!

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