

A large auto insurance company has expanded into homeowner and renters insurance and wants their agents to promote the new products to their current customers. The agents want to be able to target specific customers based on where they live, as well as the level of current policies they have.

Solving this challenge will benefit the agents in the following ways:

- ◆ By sending pertinent promotional or advertising information to a focused group of customers, the agent should experience more positive results for their promotional efforts.
- ◆ By using a phone campaign instead of paper, the agent runs greener, and each campaign costs less.
- ◆ The insurance company customers will feel like the agent is familiar with their current policies because only pertinent campaigns are being sent to them, leading to improved customer loyalty.
- ◆ By using a phone campaign based on up-to-date customer data, the agent can run campaigns quicker with less delay waiting for printing and mailing, leading to more timely customer service and interaction.



THE SOLUTION

The focus of this solution is to create an automated Dial Out function tied to the agent's customer database which is tied to specific customer information for different policy promotions.

1. An agent creates a query that selects a focus group of customers to send an audio message to their contact phone numbers; the message being sent is pertinent to the focus group's current customer status.
2. Insurance company management records the promotion in various languages allowing them to query and communicate with customers based on their preferred language.
3. The agent schedules the calls to occur at the most effective time(s) of the day for improved results.
4. Customers or potential customers acknowledge the calls through the keypad on their phones and indicate they are interested in the products and/or services being promoted and would like more information.
5. Customers or potential customers acknowledge the calls through the keypad on their phones and indicate they would like to be connected to a live agent to speak more about the products and/or services promoted during the call.
6. The results of the campaigns are available through standard reporting features, giving the agent the data they need to more accurately plan a more profitable product and services line-up catering to the surrounding demographics.