

A Leading Philippines-based Insurer Digitizes Contact Center Functions for Improved Sales and Customer Service

About the Client

The client is one of the leading motor insurance companies in the Philippines, offering a wide range of general insurance products for individuals, small and medium enterprises, local and global corporations. Its wide range of product lines includes motor, travel, property, and mobile insurance.

The Client's Requirements

Digitizing end-to-end contact center functions | Connecting disjointed legacy applications | Delivering superior experience to prospects and customers | Reducing the turnaround time (TAT) | Overcoming process inefficiencies and maximizing growth

Challenges Hurting Efficiency of the Insurer's Contact Center

The insurer was looking to improve its customer support, retention rate, and new sales. However, the disjointed legacy systems were acting as a stumbling block and were not allowing the insurer to bring sustainable practices into day-to-day operations. These challenges were hurting overall sales/renewals, and customer services process.

The dialler was not integrated with the customer relationship management application, which in turn was operating independently of policy administration, claims, and loyalty systems. Most other channels of customer engagement including email, website, and social were operated manually. Due to the absence of an automated tracking and monitoring mechanism, closure of leads and renewals became a time-consuming task. Further, due to the lack of a unified view of customers and fragmented systems operating in the backend, the agents were placing dependency on multiple systems while responding to customer queries and were often maintaining duplicate details of customers in their systems. Due to these challenges, the client realized the urgent need to streamline its end-to-end process.

With extensive experience in the insurance domain, supported by a low code digital automation platform, Newgen was in a perfect position to help the insurer in attaining its business objectives.

Challenges Snapshot

- Manually creating and following-up with leads
- Lack of auto-renewal requests creation
- Working across disjointed systems to get existing customers' details
- Segregating customers based on their profiles for outbound calling campaigns
- High TAT
- Following up with different functions for case closures offline

Newgen's Solution to Digitize the Contact Center Applications

Newgen has deployed its contact center solution, based on a digital automation platform, to transform the complete contact center functions.

With Newgen, the insurer has enabled its agents to assist in telesales, renewals, cross-selling/up-selling, handling customer queries, complaints, and service requests in a smooth manner. The business users can now easily capture their customers' feedback and take the required steps of actions immediately.

The Newgen-deployed solution has integrated seamlessly with the dialler to help call pop-ups for inbound and outbound calls. The solution has also connected with the backend systems to sync/pull customers, order, and holdings data as per the business needs. The system conveniently tracks all the interactions, cases, and contacts, created with a customer/prospect. These captured records can be leveraged to cater to business needs in the future, do informed selling and servicing. Besides, these records can be used for tracking the performance of all the call center agents.

Newgen automated the client's contact center operations covering:

- Product inquiry
- Quotation
- New business
- Outbound calling campaigns
- Cross-selling/upselling
- Renewal business
- Claims processing
- Endorsements
- Policy inquiry
- Emergency protection
- Roadside assistance
- Surveys and complaints

Highlights of the Solution

- Configurable user desktop for the contact center agents to get insights on metrics, activities, and cases
- Multi-channel engagement with customers across various channels
- Seamless interaction thread management for each case/lead
- A robust layer connecting claims application, policy admin system, and dialler to provide a secure working environment for agents
- Intuitive dashboard for 360-degree customers' visibility and report generation



Business Benefits Achieved



Improved lead conversion rate



Increased retention (renewals) rate



Efficient processing of customer requests, thereby minimizing TAT



Instant response to customers' queries, reducing average handle time



Improved metrics tracking



Enhanced customer satisfaction

About Newgen

Newgen is the leading provider of a unified digital transformation platform with native process automation, content services, and communication management capabilities. Globally, successful enterprises rely on Newgen's industry-recognized low code application platform to develop and deploy complex, content-driven, and customer-engaging business applications on the cloud. From onboarding to service requests, lending to underwriting, and for many more use cases across industries. Newgen unlocks simple with speed and agility.

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