

# CASE STUDY | PROGRAM ADMIN

## INSURANCE EXPERIENCE CENTER

## INSURANCE EXPERIENCE CENTER HELPS DISTINGUISHED PROGRAMS WIN A STEVIE AWARD!

### ABOUT THE CUSTOMER

Distinguished Programs is a leading national insurance program administrator providing specialized insurance programs to brokers and agents with specific expertise in Real Estate, Community Associations, Cultural Institutions and Hospitality & Restaurants.

### THE CHALLENGE

In their commitment to continuous improvement, Distinguished Programs sought to increase their customers' experience and engagement. They approached this methodically, and looked to understand how they could not only impact service levels, but improve efficiencies that would positively impact their own productivity and that of their customers.

Through insightful interviews with clients and the development of a broker's customer journey, the Distinguished Programs' Customer Engagement Team identified several 'moments of truth'. With the information gathered, the team sought to implement an innovative solution that would transform the way they deliver their customers' experience.

### THE SOLUTION

The Customer Engagement Team took a variety of steps, including investing in a new CRM system to handle service requests and integrated a more sophisticated phone system. In addition, a cornerstone of the new structure was implementing ReSource Pro's Insurance Experience Center Custom<sup>IX</sup> Solution.

The Insurance Experience Center (IX Center) is designed to deliver state-of-the-art customer experiences for the insurance industry. Serving as an extension of the client, the IX Center team seamlessly help customers with any and all requests posed to them with integrated processes, analytics and customer service practices.

In addition to supporting Distinguished Programs' clients throughout the insurance policy lifecycle, the team provides a new live web chat feature and extended service hours.

"At the IX Center we think about service the same way Amazon, Zappos, and other leading service organizations do. To have our partner recognized is a testament to the impact of our different approach to customer experience in the insurance world," explained Travis Van Dyke, IX Center Manager. All IX Center staff are insurance professionals, who receive multidisciplinary training, including contact center excellence, process optimization and insurance policy management. This ensures that Distinguished Programs' clients are seamlessly receiving the highest levels of service.

## DISTINGUISHED. PROGRAMS

### CUSTOMER PROFILE

Distinguished Programs - a national insurance program administrator

### LOCATION

Northeast, US

### BUSINESS NEED

Improve customer service and engagement to increase retention.

### SOLUTION

IX Center Custom<sup>IX</sup> Solution

### THE IMPACT

- Distinguished Programs received a national award for customer service acknowledging their improvements.
- Call abandonment rate drops from 33 percent to 8 percent.
- Average speed of answer down from 45 seconds to just 13.

### ABOUT THE STEVIE AWARDS

The Stevie Awards are the premier business awards on an international level and recognize the achievements and positive contributions of companies across the globe. The awards circuit began in 2002, and garnering a Stevie has fast become one of the business world's most coveted titles, with representation covering more than 60 nations.



## THE RESULTS

Distinguished Programs' broker-centric approach, combined with the service excellence and best practices that the IX Center team implemented, has delivered phenomenal results:

- **Award-winning Customer Service**

Distinguished Programs was awarded a 2017 Stevie Award for Customer Service Department of the Year in the Financial Services category and a 2017 Stevie's People's Choice Award for Favorite Customer Service. The Stevie's People's Choice Award was decided in a worldwide competition which reached more than 149,000 votes. As one Stevie judge noted, "This was a lot to accomplish in a year—well done!"

- **Dramatically Reduced Call Abandonment Rate**

From 33 percent in 2015 down to 8 percent by end of 2016.

- **Significantly Improved Response**

The average response rate for a customer decreased from 45 seconds to just 13.

- **Proven Business Continuity**

During a company-wide phone system outage at Distinguished Programs' offices, the IX Center's business continuity phone system kicked in, rerouting every call back to the IX Center, mitigating any potential losses.

## IMPROVING SERVICE AND PROFITABILITY

The market's demand for excellent customer service is constantly increasing, but it's not always feasible or cost-effective for companies to deliver high levels of service to every account with their existing internal teams. The IX Center optimizes the customer experience and policy lifecycle so that all accounts can become profitable with increased customer retention, satisfaction and growth.

## ABOUT RESOURCE PRO

ReSource Pro brings to the insurance industry tools, technology and strategic services that enable profitable growth through operations excellence. Headquartered in New York, ReSource Pro's global service centers address client operational needs around the clock. Recognized as an industry thought leader and listed as one of Inc. 500/5000 Fastest Growing Private Companies annually since 2009, the company is renowned for its focus on innovation, service excellence and trusted partnerships, and its unique productivity platform for insurance operations. Over 4,000 ReSource Pro employees provide dedicated support to hundreds of insurance organizations, consistently achieving a 97% client retention rate for over a decade.

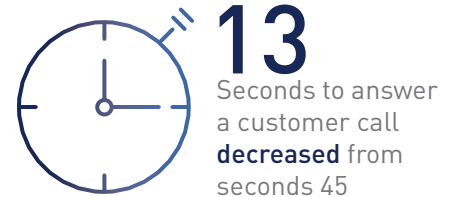
## FOR MORE INFORMATION

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## RESULTS WITH IMPACT



Call abandonment rate **reduced**



Received **International Customer Service Award** recognition

