



ABOUT THE CLIENT

A \$4.2 billion international insurer offering a range of specialty insurance products.

CLIENT CHALLENGE

The client was among the first to capitalize on putting insurers in direct touch with potential customers eager to buy their products via online channels. Even with more information available online, the insurer needed methods to better support customers to address questions and advance the sales process. Therefore, the carrier needed to implement live call handling for quoting, binding, and customer service to ensure all customer questions were satisfactorily answered. To expand its successful UK model across the diversity of business needs in the US, the company looked for a partner with demonstrated capabilities encompassing:

- Policy underwriting experience, specifically for business-to-business property and casualty insurance
- Multi-channel, inbound and outbound customer contact processes
- An integrated technology platform supporting seamless customer service across multiple policy systems
- A strong pool of advisors trained and licensed to back up the online sales platform with responsive support for direct buyers and over 160 partners and wholesalers in 49 states
- Proven call center technology and infrastructure
- Ability to quickly scale based on explosive growth

The overall goal was to drive a seismic shift in how business consumers buy insurance, while establishing the company as a premium brand in the US.

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Sutherland provided a technology-enabled, service solution with a single interface for all agent needs.

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THE SUTHERLAND TRANSFORMATION

Sutherland created a best-in-class service center staffed with a team of dedicated agents licensed in 49 states and the District of Columbia. These agents were specifically recruited for this insurer and trained to understand the target customer. We also provided a technology-enabled, service solution with a single interface for all agent needs. Key components include:

- Multichannel customer contact via phone, email, chat, and callback
- Specially trained licensed agents selling customized commercial insurance products
- Integrated front and back office operations, providing single-system access to advisors for quotes, underwriting, sales, premium processing, and customer service
- Policy underwriting and issuance
- First notice of loss
- Experienced team management and quality assurance personnel
- Dedicated client space in Sutherland's insurance center of excellence
- Sales operations dashboard and telephony reports to monitor performance and to continuously improve the customer experience with multi-touch alerts, expiring credit card alerts, and new product endorsement tracking to identify individual sales opportunities

All customer contacts are serviced and tracked in the same platform, which integrates with the insurer's backend policy administration and financial systems to ensure seamless transactions for both the agent and the customer. An integrated third-party customer satisfaction survey provides unbiased customer feedback, helping the company track the growth of their brand in this new geography.

PARTNERSHIP RESULTS

While the online solution provided self-service capabilities and around-the-clock information access, Sutherland's human-based customer support proved to be a strong differentiator that ensured customer confidence in the carrier's products. Sutherland managed an action plan to build a direct distribution solution for the insurer. In addition, tight integration with the sales backend systems streamlined timelines, contained costs, and made reporting more robust. Results to date include:

 **\$100 million**
Fast growth in
new gross written
premium

 **+98%**
Satisfied customers

 **20%**
Higher policies
per sale

Customer Experience
Care & Support
Direct Distribution

For more information on how we can help you transform your processes, visit us at www.sutherlandglobal.com, email us at sales@sutherlandglobal.com, or call 1-800-388-4557 ext. 6123.

As a process transformation company, Sutherland rethinks and rebuilds processes for the digital age by combining the speed and insight of design thinking with the scale and accuracy of data analytics. We have been helping customers across industries from financial services to healthcare, achieve greater agility through transformed and automated customer experiences for over 30 years. Headquartered in Rochester, NY., Sutherland employs thousands of professionals spanning 19 countries around the world.

