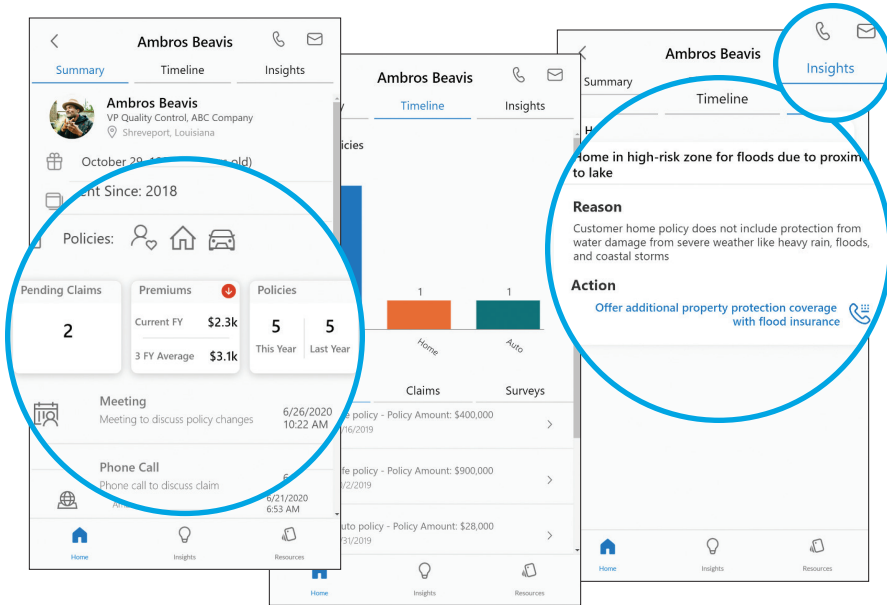


# Customer Insights for Insurance Carriers with Captive Agents

As an insurance carrier with captive agents, you understand one thing: If they don't sell competitively, your company suffers. But the challenge lies in how to help them be as productive as possible—to get the most return out of every minute of their time. And there is also your direct sales team. How do you support their efforts?

## BUILDING “PREDICTIVE” RELATIONSHIPS

The answer: Providing agents with the ability to gain actionable insights. These insights will help them uncover opportunities for cross-selling and upselling as early on as possible so they can take action. Rather than waiting for a phone call from the customer, they are armed with the insights they need to make the first move, eliminating the risk of dissatisfied customers or worse—customers lost to another carrier that was more proactive.



Agents need the ability to:

- > Mine and analyze data from multiple sources (including social media) about anything that might be impacting their customers (economic conditions, world events, etc.), so they can correlate trends with potential recommendations and product offerings
- > Monitor potentially catastrophic events so they can proactively reach out to insureds, limiting your risk of exposure
- > Set triggers to ensure action is taken on trends or other events, so they—and their customers—never miss an opportunity

## 4 TO 5-WEEK ENGAGEMENT

Our 4-5 week engagement uses our asset management experience to help you with the implementation of a true Customer Data Platform (CDP) strategy. It is designed to quickly deliver value with a consolidation of your organizations' most crucial customer information, to gain a full and accurate view of all elements you need to answer questions about your target market.

### Our Offering includes:

- > Discovery workshop to review up to 3 of your main data sources (Campaign management solution, Financial solution, and third-party data aggregator) and identify the KPIs that are critical for your business and the data elements needed to generate them.
- > Configuration of Sandbox and Production environments
- > Creation of data storage entities and upload procedures
- > Configuration of customer profiles and measures using the data sources and data elements identified during the Discovery workshops
- > Configuration of PowerBI dashboard with up to 3 different views that will provide visual and detailed access to the Metrics and KPIs defined during the Discovery workshops
- > One User Admin training session and one End-user training session

### Resources and Pricing

The engagement will include a Customer Insights Architect and a Financial Services practice specialist.

Price: US \$50,000

Getting that data is not a problem, but how do you turn it into actionable insights? Microsoft Customer Insights adds a value layer to any CRM to consolidate data from anywhere, including back-office applications, social media, or other sources, without the need for significant integration or development. Customer Insights then applies artificial intelligence (AI) based on your parameters and triggers to give agents access to predictive information that will transform their relationships with their customers.

### **BENEFITS: EMPOWERED AGENTS, LOYAL CUSTOMERS**

- > By getting in front of all the relevant data—regardless of source—your agents become strategic advisors, not just order takers.
- > Agents stay on top of their customers' trending ideas, empowering them to change transactional relationships into true partnerships.

With Customer Insights, your agents—and their customers—will never miss an opportunity. That's how to win a customer for life.



### **Why AKA?**

For more than two decades, AKA Enterprise Solutions has been dedicated to making it easier for asset and wealth management companies to do business and innovate their way to greatness by using technology to simplify processes and reduce risks. Specializing in Microsoft Dynamics 365, cloud services, business process consulting, and custom application development, we combine industry and technical experience, proven methodologies, and world-class consulting to help organizations achieve their goals. The company is headquartered in New York, NY, with team members located throughout the U.S.

### **ABOUT AKA ENTERPRISE SOLUTIONS**

AKA specializes in making it easier to do business, simplifying processes and reducing risks. With agility, expertise, and original industry solutions, we embrace projects other technology firms avoid—regardless of their complexity. As a true strategic partner, we help organizations slay the dragons that are keeping them from innovating their way to greatness.

