



INSURANCE LEADER EXPANDS AGENTS' BUSINESS FUNNEL, REDUCES CHURN AND MAXIMIZES AGENT AND BRANCH VISIBILITY

CLIENT PROFILE

A fortune 2000 global insurance leader with presence in more than 30 countries, more than 20 million customers and more than \$30 Billion in premiums - a major player in the global insurance industry. Operates through a large distributed network of independent agents and branches.



With Gefen, we inspired our agents to connect with customers, resulting in more than an 80% increase in overall engagement!"

**Sales and Distribution
Manager**

EXECUTIVE SUMMARY

The company was facing several challenges: they wanted to expand agents' marketing funnel to drive more business, improve agent ratings, increase branch-awareness as well as reposition the brand in the customer's mind as a digital innovator. With Gefen the company was able to:

- Improve agents' NPS
- Reposition their brand as a modern, digital insurance provider
- Promote social responsibility with a donation campaign
- Create digital presence and increase traffic to its branches

CHALLENGE

- Branches didn't have digital presence or interaction directly with customers. Only "Corporate" digitally interacted with end customers
- Sought to improve agents NPS
- Searched for opportunities to impact agent-customer relationships and reposition the brand as a modern, digital insurance provider

CHOSE GEFEN TO TRANSFORM ITS DIGITAL CAPABILITIES

- 90 days - time to full implementation
- x2.5 web traffic to new agent/branch personalized sites (with corporate branded content)
- -7% agents churn rate
- 94% agents active engagement
- Full corporate visibility and control over digital presence and communications

CHALLENGES

The company had failed to leverage on existing branch-agent-end customer relationships which were built over years in the physical world. A separate website was built for each branch and its' agents, with no centralized control - which resulted in poor NPS ratings. In addition, they were having a hard time getting people to the branch, and converting/connecting with them then and there. Furthermore, they faced high agent churn because agents felt that although they are the face of the company, when it comes to digital, it's wasn't about them - only about the corporate. This resulted in a brand image problem as they were perceived obsolete.

The corporate tested various solutions but they covered only some of the challenges and did not integrate with their core legacy systems. One key need they could not compromise on was to track and monitor branch's digital activity, enforce compliance and preserve brand behaviour.

HOW GEFEN HELPED

The company adopted Gefen's platform for initial use across one of its multiple geographies.

Within a 90 day implementation & integration effort, including corporate and agent on-boarding, the system became operational.

With Gefen all branches had a customized website template, aligned to the brand's messages, colors and tone. With smart, personalized campaigns and smart purchase of targeted traffic, the company managed to increase engagement by 250% and created 15,000 new in-branch interactions with customers within 12 weeks.

Another smart response to current events resulted in a donation campaign that created great traction, moved customers and positioned the company as a socially responsible, digital innovator that gives back to the community - and also increased traffic to the website.

In an effort to reduce agent churn and get good agent reviews, the company initiated an engaging campaign which prompted customers to rate their agents. The campaign had 10% open rate and out of all customers who read and clicked the email, 68% rated the agent. ALL ratings submitted were positive!



Gefen's mobile-first approach enabled us to put the branch in the palm of our customers' hands. We created instant connection and engaged them on a whole new level!"

Sales and Distribution Manager

RESULTS, RETURN ON INVESTMENT AND FUTURE PLANS

With Gefen the company achieved:

90 DAYS

Time to full implementation

x2.5

Web traffic

-7%

Agents churn rate

94%

Agents active engagement

These numbers represent an increase in sales as well as in savings, compared to the alternatives the company was considering. The company is rapidly expanding its use of the platform across more regions as well as increasing use of social abilities, digital advertising and voice technologies.