

“The Customer Experience Journey”

IIABA/ACT Webinar

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June 22, 2015

1:00 to 3:00 p.m. Eastern Time

What is This Webinar About?

The technology-focused webinar will cover the accelerating aspects of the Customer Experience; what insurance consumers – and eventually customers – expect from interactions with agents and carriers. The session will provide a clear understanding of the touchpoints, with a focus on those that are technology-related, that the insurance consumer experiences across the “phases” of their insurance journey;

- Discover
- Evaluate
- Purchase
- Experience
- Renew/Leave
- Advocacy Choice

Who is it For?

This program is designed for all personal and commercial lines insurance professionals who are interested in creating – or extending – their technology strategy to attract potential customers, as well as provide an ease-of-conducting-business environment for agency reps to sell to, and service their clients. In addition the course will discuss how agencies can use these strategies to not only retain their clients, but also help them become advocates for their agency.

Learning Objectives:

At the conclusion of this seminar, you should be able to:

- Compare your current agency strategy to the overall recommendations from the ACT Customer Experience (‘CX’) work group.
- Understand the full insurance journey cycle, and have a better understanding of consumers’ customer experience expectations, and how they determine our distribution channel’s sales and service strategy.
- Understand the industry resources available to help set your technology strategy – From the full ACT Customer Experience ‘Recommendations’ document, to industry and technology vendor resources.
- Be able to align your strategy with your customers’ needs.

*** Agenda next page ***

Agenda

TIME (min.)	TOPICS
15 Ron B	<p data-bbox="443 346 1122 380">Intro – ACT and CX Work Group Background</p> <p data-bbox="443 422 1328 562">ACT’s overall purpose as a resource for agents. The emphasis on Strategic Trends, and the need for focus and education around the Customer experience. Creation of the Customer Experience Work Group.</p> <ul data-bbox="492 604 1174 716" style="list-style-type: none"><li data-bbox="492 604 959 638">• ACT Work Group background<li data-bbox="492 642 878 676">• Goals and work product<li data-bbox="492 680 1174 716">• How & Why the CX Work Group was created
25 Judy	<p data-bbox="443 840 1060 873">Transitioning into the Customer Journey</p> <p data-bbox="443 915 1409 1020">Judy will discuss the aspects of the customer journey, and the need for parsing the journey out into ‘phases’. From there, we will discuss the defining breadth and depth of the journey:</p> <ul data-bbox="492 1062 1393 1367" style="list-style-type: none"><li data-bbox="492 1062 646 1096">• Phases<li data-bbox="492 1100 1187 1134">• Using ‘Personas’ to more clearly define needs<li data-bbox="492 1138 1029 1171">• Mapping out individual touchpoints<li data-bbox="492 1176 1393 1209">• Defining their characteristics: impact, type, phase placement<li data-bbox="492 1213 1166 1247">• Determining ‘Resources’ – industry vs. other<li data-bbox="492 1251 862 1285">• Prioritizing touchpoints<li data-bbox="492 1289 1214 1323">• Gaining additional insight – Experts, Pilot Group<li data-bbox="492 1327 1084 1360">• Creating ‘recommendations’ document
10	<p data-bbox="394 1482 683 1516">Phase 1 - <i>Discover</i></p> <p data-bbox="443 1558 1406 1698">In this phase, consumers become aware they need insurance. Discuss the critical aspects agents can leverage to be visible on customer searches and agency website views. Creating awareness through an effective and relevant presence.</p>
10	<p data-bbox="394 1776 680 1810">Phase 2 - <i>Evaluate</i></p> <p data-bbox="443 1852 1377 1957">At this point, potential clients are assessing the value your agency can provide. Generating favorable consideration and capture the consumer through a sound digital presence.</p>

<p>10</p>	<p>Phase 3 - <i>Purchase</i></p> <p>This is a critical phase for your customer – In almost all other aspects of their lives as consumer, business make it fast & easy to do business with them; they expect the same here. The goal here is to make the purchase easy, and deliver an experience demonstrative of the quality and nature the consumer expects.</p>
<p>10</p>	<p>Phase 4 - <i>Experience</i></p> <p>Once a consumer has become your customer, is even more important to show your agency’s value and support of them. We’ll discuss how to use tech resources to establish an affiliation (or bond) with your Client through continued engagements which deliver noticeable value.</p>
<p>10</p>	<p>Phase 5 - <i>Renew/Leave</i></p> <p>It’s renewal time – Actually, <i>almost</i> renewal time. Here’s where clients can start shopping around, looking for better price, but not necessarily knowing the better value. The goal here is to reinforce your affiliation through proactive engagement to secure the renewal with terms representative of their Client’s current needs.</p>
<p>10</p>	<p>Phase 6 - <i>Advocacy Choice</i></p> <p>You’ve done everything you can to ‘wow’ your clients. Help them to help <i>you</i>: Leverage your client’s affiliation to drive future sales.</p>
<p>10</p> <p><i>Ron</i></p>	<p>Summary / Your Resources & Action Steps</p> <p>Now that we’ve clarified the phases, discussed actions and resources, we’ll discuss the overall ‘recommendations’ document as a planning guide, and next steps for the ACT CX Work Group.</p>

Instructional Time: 120 minutes (w/questions)