

ENKI CASE STUDY

PROGRAM EXECUTIVE - SALESFORCE MIGRATION

Overview

Our client is a Fortune 50 property and casualty insurance and financial services company with 18,000 agents, 343 claim offices, 30 operations centers, and annual revenues of \$70 billion.

Problem

- Technology selected to enable the sales processes (SalesForce) did not align with the existing sales structures and processes.
 - Structure was expensive with poor client interaction management outcomes
 - Poor customer satisfaction ratings across all channels
 - Slow adoption to new organization structure and services in all channels
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Action

- Collaboratively engaged teams to develop new KPIs and metrics.
 - Created new business designs to leverage new technologies.
 - Redesigned the sales, service and client interactions business areas.
 - Facilitated business redesign sessions for a customer centric organization.
 - Performed organizational change management for transition.
 - Created business designs for agents' to new CRM business architecture.
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Outcome

- Improved business response to rapidly changing events through single source communications and enablement (proactive customer engagement after potential insurance related event such as severe weather).
- Improved cross-functional collaboration and engagement reducing time for resolution of issues (including events).
- Improved employee understanding of work assignments and outcomes.
- Drove facilitation and governance of business and technology designs.
- Improved customer experience NPS metrics by 1.1 points.
- Improved sales pipeline speed by 22%.