INDUSTRY USE CASE

Smart Communications

SMARTCORR™

for salesforce

How This P&C Insurer Wowed Its Customers With a Better Claims Process

Scale the Conversation™

SMART COMMUNICATIONS™

SMARTCORR™ for salesforce

The act of filing a claim serves as a moment of truth in any insurance-customer relationship, and the experience truly can make or break a customer's loyalty. According to an Accenture study, just the mere act of filing a single claim can increase a customer's likelihood of switching providers by almost 20%. With such high stakes and hungry competition, it's no wonder insurers are striving to deliver claims experiences their peers can't compete with.

Upgrading fragmented customer communications infrastructure with a modern customer communications management (CCM) solution that's pre-integrated with Salesforce can make all the difference when it comes to optimizing the claims process. Take this P&C insurer, for example:

Life is Status Quo

The insurer was facing numerous customer communications challenges. Messages weren't personalized, timely, or well-tailored to its customers' needs. Agents were frustrated with the time-consuming process of manually formatting individual templates and documents, finding that it restricted their ability to handle more requests. Additionally, limited communications functionality made it difficult to meet industry regulations and ensure compliance.

Technology roadblocks were also painfully apparent in the claims handling process. Claims agents couldn't select and issue correspondence in real-time when dealing with customers on the phone. They couldn't deliver claims progress updates to customers or edit claims letters despite much-needed changes in over half of their letters. And without electronic signature options and pre-populated forms, case resolutions were delayed.

...Their Customers Deserve Better

The insurer knew the importance of delivering an outstanding customer experience, and they also knew they couldn't do it with their disconnected Word-based document generation solution.

Uncovering the Secret to Success

Since they were already using Salesforce Sales and Service Cloud to manage customer relationships, they were thrilled to find SmartCORR™ for Salesforce. This modern customer communications solution enables business users to seamlessly leverage Salesforce data, objects and functionality to enhance communications.

With SmartCORR™ for Salesforce, Insurers can:

Speed the claims process, saving time for employees and customers

Improve the customer experience with personal interactions

Remove dependencies on Microsoft Word and other third party document generation applications

Reduce risks and liability by ensuring accuracy, control, and auditability of communications

Increase customer retention by delivering a great experience when they need you most

Reduce or eliminate training for front-line employees

Take advantage of modern cloud technology to reduce expensive data infrastructure and maintenance

Scaling the Conversation with SmartCORR™

It didn't take long after SmartCORR was implemented for things to improve. The insurer's staff could now rely on centralized templates and Salesforce data to initiate the claims process.

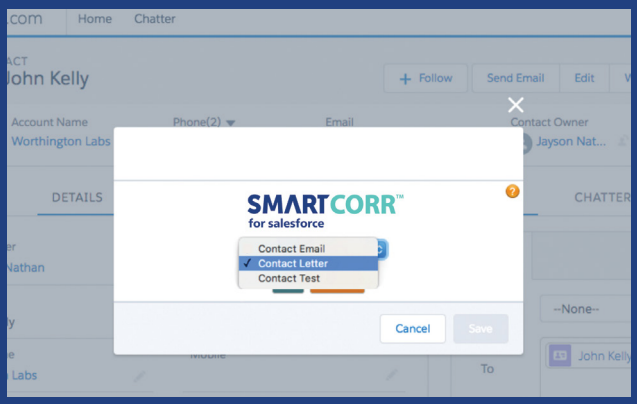
INTERNAL EFFICIENCIES INCLUDE:

- **Reduced time and cost associated with templates:** The SmartCORR powerful in-browser template editor simplified template design, allowing the insurer to get rid of extensive, costly libraries of Microsoft Word templates. The elimination of manual processes and the 20x reduction of templates saves agents time, every single day.
- **Fast start-up:** Because the solution is so incredibly user-friendly, training time for new staff went by the wayside, enabling agents to get started right away.
- **Increased productivity:** With a more efficient claims interface through the Service Cloud Console, claims agents became more productive faster, and with less training.
- **Improved data access:** SmartCORR's seamless Salesforce integration puts valuable customer data right at the user's fingertips for easy personalization.
- **Streamlined user experience:** Service Cloud Console support allows users to request, draft and finalize communications in just a few clicks from any open tab in the Console.

Most importantly, the insurer's customers felt more engaged and valued. As a result of their improved experience interacting with the insurer, customers placed more confidence in the insurer as a trusted provider.

CUSTOMER-FACING BENEFITS INCLUDE:

- **Greater personalization:** Customers now receive more relevant, accurate, and personalized communications containing the most recent information about their claim.
- **More timely:** By eliminating manual processes, the insurer provides communications out to customers faster. Real-time information means real-time relationship cultivation.
- **Faster case resolution:** With SmartCORR's integrated e-signature feature, the insurer no longer experiences signature-related case resolution delays.

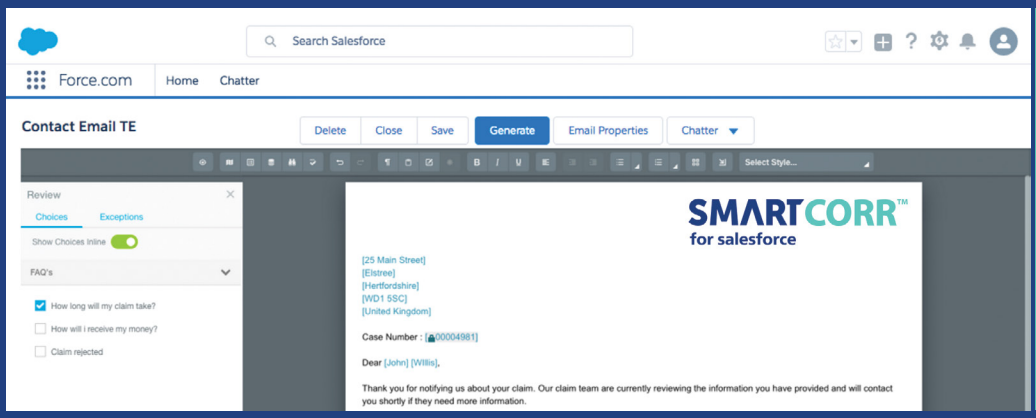


Users work right within the Salesforce environment.

SmartCORR™ for Salesforce in Action:

When making a claim with the insurance company, the customer contacts the call center and a claims agent fills in the required fields in Salesforce to initiate the claims process.

With the customer still on the phone, the agent clicks a button to initiate a new communication and selects the appropriate template from a drop down menu – in this case, an email with the details of the accident or loss and the initial claim notice.

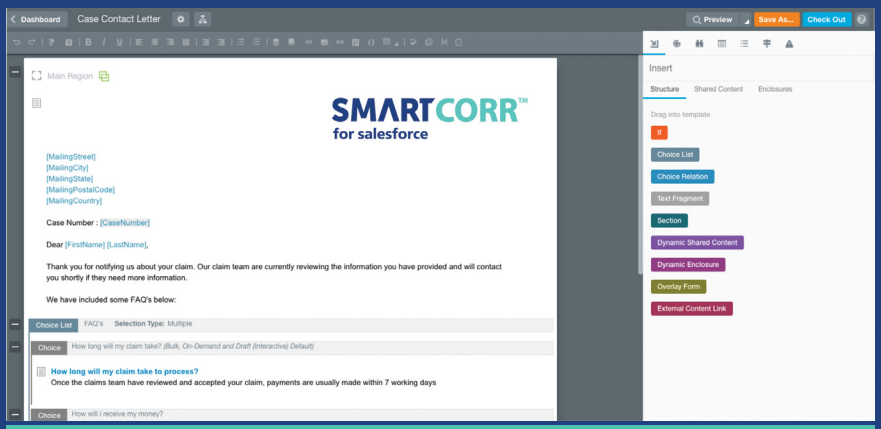


Empowers agents with talking points and content.

Customer data is auto-populated from Salesforce.

A formatted version of the email appears in Salesforce with the customer data already there. It contains some text that can be modified as well as areas that are not allowed to be changed to ensure regulatory compliance. The claims agent easily makes the necessary changes, quickly scans it to check for accuracy and clicks 'Send'.

SmartCORR for Salesforce handles the rest to ensure that the document is emailed or printed, depending on the customer's preference. It's also automatically attached to the Salesforce customer record for future reference and auditing. SmartCORR for Salesforce is integrated into a workflow developed to automate the claims process. Throughout the process, claims agents are notified of the claim status and receive a notice through Salesforce to follow up with the customer. The agent opens a draft document in Salesforce and adds a brief, personal note updating the customer of the status and providing information on next steps.



Consolidate multiple templates into one right within SFDC

Again, the template is created by SmartCORR for Salesforce and the communication is managed by the claims agent, entirely within Salesforce. No more reliance on Microsoft Word or other third-party document generation applications. As the templates are managed centrally and made available through Salesforce, any update – including branding – is automatically available. Sections include content that is shared across multiple templates, which both reduces maintenance and ensures consistency.

Connect with Us

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Smart Communications helps the world's largest enterprises simplify their customer and business communications – while making those communications do even more. In 2004, we pioneered the new generation of CCM solutions, and today we're still leading this industry as the only cloud/hybrid-cloud solution in the Gartner leaders' quadrant. Smart Communications customers rely on our team for the undivided attention of the only independent company 100% focused on enterprise CCM. No one does more to simplify template management and put so much control in the hands of the user. That's why more than 300 global brands – many in the world's most highly regulated industries – rely on us to scale the conversation.

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