



Case study

Retail insurance

Issue:

A large US property and casualty insurance company wanted to conduct a survey among customers of each of its agents. The results would direct strategies at the micro/agent level from year to year.

Action:

Each year, a four-page survey is mailed to up to 1,000 customers for each of the company's thousands of agents.

Every agent receives a standardised report (but customised to the data specific for that agent) containing their agency's survey and statistical results, as well as all verbatim comments from their customers. These results are delivered via a password-protected website. Additional reporting includes rollups to the regional offices and headquarters.

The combination of mailed surveys, automated customised reporting and high-volume leads to a programme that is affordable even though it includes every agent.

Finally, each agent gets specific recommendations as to how to increase retention and cross-sell additional services. Reports outline specific step-by-step instructions on how to initiate those changes.