



Improving Policyholder Engagement through Omni-Channel Experiences

The Vision

- Decades of complexity within insurance carriers has slowed digital transformation - preventing a unified customer experience for agents, customer service reps, and policyholders.
- In today's market, carriers' ability to connect their systems of engagement with their core systems is critical to meeting the expectations of policyholders. Both policyholders and agents expect the same convenience from their insurers that they receive in other aspects of their life. According to the Salesforce "State of the Connected Customer" report, 79% of consumers say that the customer experience a company provides is as important as its products and services. In addition, 75% expect companies to provide consistent experiences whenever they engage them.
- This blueprint summarizes the key elements needed to drive policyholder engagement through digital, omni-channel convenience.
- By unifying user experience through digitization, carriers can build trusted relationships with their policyholders.

Requirements

The following are key business and / or organizational steps necessary to create a true end-to-end digital platform:

- Policyholders are looking for better communications with their insurance carriers. Carriers need to prioritize their digitization efforts to consolidate their number of communications, provide consistency, and use a strategic approach to drive intelligent interactions for agents and service reps who interact with policyholders.
- To create a truly end-to-end digital platform, companies like Salesforce, the leading customer engagement platform, have partnered with companies like Duck Creek Technologies, a leading P&C insurance platform provider, to offer a more comprehensive experience for agents, customer service reps, and policyholders.



The Process

- Omni-channel support - policyholders with sales or service requests reach out to their agents or customer service representatives for personalized, actionable support - on any channel, at any time.
- Unified data and elevated service - empower agents and customer service reps by unifying all customer data on a single screen, and offering guided tasks for key insurance processes such as customer onboarding, claims processing, and more.
- Built-in core system integration - gear up quickly while ensuring long-term results with the Duck Creek Platform.
- 360-degree views and opportunities - gain a single view of each customer's policies, claims, and cases, to deliver better service and uncover opportunities for growth. Plus, with actionable insights, service reps can provide intelligent suggestions, recommendations, and next steps.

Outcomes

Duck Creek for Salesforce offers the best of both Duck Creek and Salesforce for P&C carriers ready to leverage world-class CRM along with Duck Creek's core systems for Policy Admin, Billing, Claims, and Distribution Management.

The Salesforce + Duck Creek Advantage

"Duck Creek for Salesforce," listed on the Salesforce AppExchange, extends Duck Creek's leading P&C insurance platform into Salesforce Financial Services Cloud, providing a unified user experience for agents and customer service representatives.