

CUSTOMER SPOTLIGHT



Improving agent productivity by taking action on contact center insights



Results

5% ↑

in Call Centre satisfaction

3X ↑

in Call Centre survey response rates

SUMMARY

- Long-time insurance company, SGI, wanted to improve the customer experience by seeking input directly from its 980,000+ customers.
- The organization deployed Medallia's Contact Center Suite to better understand customer sentiment and uncover insights that will improve the call centre experience.
- Now, customer care agents along with management, executives, and certain partners all have access to key feedback and data from customers in near real-time.
- This data sharing has led to many improvements that impact the customer experience, including a 5% increase in call centre satisfaction, and a positive improvement in first call resolution, increasing survey response rates, and better ratings, using these results to recognize key performers at SGI.

Working together across the organization to improve CX

SGI has been in the insurance business for more than 70 years. The company offers competitive property and casualty insurance products under its trade name of SGI CANADA in B.C., Alberta, Saskatchewan, Manitoba and Ontario. The company employs more than 2,000 people, including 700 customer care agents, and works with a network of 500+ independent insurance brokers. At a time when many agencies are going direct-to-consumer, SGI chooses to embrace its broker network as a way to provide a personal connection and better customer service.

In recent years, SGI has put a focus on improving the customer experience, with a focus on gaining insights from direct customer feedback. But the feedback that was gathered through simple surveys lived primarily in one department and was shared infrequently

and informally. It was a challenge to understand what improvements would be most important to customers and call centre agents didn't have the tools they needed to succeed.

Measuring effectiveness, ease and emotion

With its customer-centric emphasis, SGI is focused on getting feedback around effectiveness, ease, and emotion directly from SGI customers. To aid in this effort, the company deployed Medallia's Contact Center Suite to transform the contact center agent and customer experience. The team uses text analytics to quickly surface and track emerging issues in real-time. SGI sends post-call surveys to measure emotion and agent performance. They ask:

- How did you feel about your interaction with our contact center?
- How effective were we at meeting your needs on the call?
- How easy was it to do business with us?

“

The key metric is how they felt about the interaction. Each agent has access to view this feedback on a regular basis through personal Medallia dashboards and then of course the team meets to discuss the bigger picture regularly.”

Jason Nystrom

Director of Customer Experience Delivery,
SGI

The Medallia platform helped the team monitor and adjust as call volumes increased over the course of the pandemic. Feedback showed that customers wanted a “call back” option, which SGI had, but was presented later on in the introductory message. SGI fixed this so that it is presented earlier. More callers began using it, and satisfaction improved. In addition, SGI factored customer feedback as part of the consideration to grant agents work at home privileges.

Likewise, Medallia Promote gave more customers an opportunity to give a Google Review about the claims process. “At first, some leaders in the business unit felt it was risky and that it might attract more negative reviews,” says Nystrom. “But actually, the opposite happened. Now our customers have a direct and easy way to review our services and our ratings are heading in the right direction.”

Closing the loop faster by sharing the data

Today, more than 700 front-line employees, along with management, executives and certain partners all have access to key feedback and data from customers. The company attributes that data sharing with its ability to close the loop with customers within 24 hours and increasing survey response rates -- 2 times higher for claims and 3 times higher for the call centre.

“

Our call centre has always been customer aware and customer friendly, but now with Medallia they are especially customer focused and effective because they can use the direct feedback to make data driven decisions,” says Nystrom. “Since the implementation, we’ve seen a 5% improvement in call centre satisfaction.”

Additional benefits have included:

- **Greater visibility.** Management can now see problem areas more quickly, so coaching and training can be improved.
- **Partner support.** Now metrics can be developed to address the SGI customer experience with partners, such as repair shops.
- **Streamlined reporting.** The effort required to analyze and process customer feedback has been greatly reduced and it’s easier to share broadly, faster.

SGI is especially proud of the increase in star ratings through Google Reviews, now that more customers are providing feedback that way. “We’ve gone from a 2.1 rating to a 3.6 since we implemented Medallia—definitely an improvement!” notes Nystrom.

Learn more at medallia.com

About Us

Medallia is the pioneer and market leader in Experience Management. Medallia’s award-winning SaaS platform, the Medallia Experience Cloud, leads the market in the understanding and management of experience for customers, employees and citizens. Using Medallia customers can reduce churn, turn detractors into promoters and buyers and create in-the-moment cross-sell and up-sell opportunities, enabling clear returns on investment. [Medallia.com](https://medallia.com).

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