

# Digital Revolution **For Agency Channel**



## CASE STUDY

Upshot Live helps Leading Life Insurance Player in implementing a Digital & Customer Engagement platform to improvise Agency channel.

### THE BACKGROUND

The Agency Channel of Leading Life Insurance Player was confronting with a situation to administer the operations of insurance agents. Since a significant part of business is generated through this vertical, managing customer queries, leads, data regarding business generated, their individual targets, sales pipeline data, data regarding the company & training & learning modules and other ancillaries was cumbersome. The immediate requirement was of a centralized digital platform that was easy to implement & learn.

### THE CHALLENGE

Designing an integrated and streamlined digital and customer engagement platform was the main issue. This is necessary for administering regularly about the performance of individual agents and to carefully implementing it.

### SOLUTION - UPSHOT LIVE

Reviewing meticulously about the existing modus operandi gave insights about the changes that need to be incorporated. This transformed into a digital platform to supervise, audit and automate the business operations of agency channel.

### THE RESULT

Partnering with Leading Life Insurance Player, Upshot Live sorted the business functions thereby giving the insights about the multiple processes, segments to be improvised, divisions that need to be eliminated. This helped in devising a digital platform. Team members at Upshot Live categorized data on the basis of customers, business value, product & services and offered access to official services and learning & development modules to agents. Upshot Live ensured that the whole platform is simple & interactive and offers facility to check KPI. The solution transformed into:

- Efficient Customer Services with streamlined functions.
- Comprehensive functions to manage sales pipeline.
- Higher Productivity by trained agents connected over digital channel.

