

Overview: The ACT Customer Experience work group is working to extend their existing '[Customer Experience Journey Recommendations](#)' document. They're now focusing on creating an interactive online tool to allow agents to figure out where they are in the overall customer experience process, and what actions they should do to obtain a better experience. In creating this interactive tool, they are recruiting agents input on their best practices which will be used to finalize the matrix to be used as input to the interactive tool. . During this breakout, the specific phases that were discussed were Discover, Evaluate, Buy, Experience and Advocate. Our intent is to get insights from attendees on what is working and what opportunities we have not yet assessed.

I would add a note that there is an overall theme of personalization. Meaning that the customer wants you to know them and tailor your input/response to them. Also they want to know who they are working with, not just the agency but the individual. Many of the below bullets relate to this.

Discover—the consumer is in the early stages of the journey

What is working?

- Website and Rebranding the agency and how the agency identifies itself
- Facebook ads/Blog Articles that take people to the specific page on the website that talks about their concern or gives them information they are seeking
- Uniform Listings everywhere online
- Analyzing the google/Facebook/and website analytics
- Monitoring and responding to bounce rates on the websites or ads
- Content accelerations – gets people to go to the content
- Facebook for the agency- stick to 80/20 rule, put video on your own Facebook
- People need to be themselves, use social media to connect with friends and let them know what you do
- Compete on the local level not the national level
- Photos and Blogs of the staff- people do business with people they like and trust
- Build out your business LinkedIn profile
- Use digital to expand your footprint and use the entire state or multi-state

Evaluate - the consumer is asking, do you specialize in what I need?

What is working?

- Video should be incorporated everywhere, social media, blogs and website
- YouTube, gives you instant credibility, embrace video, increases engagement
- Be Consistent share blogs, be strategic, create curiosity
- Blog post on topics related to what people are asking, check your email for the questions that you respond to for content
- Blogs must have quality not just quantity

Customer Experience Breakout Session Notes

ACT Meeting March 23, 2017 – Nashville, TN

Buy - the consumer is looking to see if you have automation

What is working?

- Online rating tools
- Online Chat- can they get answers quickly
- eSignature- increased agency close ratio 35%
- Payment Issues- do you have methods to take the payment when you take the application

Experience - The consumer has purchased the policy, now what?

What is working?

- Ability to take payments from the agents level rather than going to multiple carrier sites
- Ability to take payments on an application (? Not sure about this one as payment wouldn't be with the initial submission/application. Think we can delete as above statement covers the need for agents to take payments and do so easily/electronically)
- Creating a bond that they don't want to leave, by constantly providing value
- Keep them in your mobile funnel, get them to be able to get all the answers from you on their app or your website. Direct links to your blogs, online certificate, bill pay

Advocate - Customer wants to go out and tell the world about their awesome experience

What is working?

- Net Promoter Score
- Testimonials – including video testimonials
- Rocket Referrals
- Post the testimonials to your website and your social media account

NEXT STEPS for the ACT CX Work Group:

- The Chairs of the CX Work Group, Claudia McClain & Judy DeLaRosa, will meet with Ron Berg to review the breakout takeaways.
- The full Work Group will then be pulled together to review this information as we move into the project phase of creating the online resource.
- We expect some form of the tool to be available for beta testing by late 2017.

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