



Signal Iduna: Optimizing sales outreach for insurance

SIGNAL IDUNA

Handoffs between departments happened via Excel spreadsheet, giving little visibility into a customer's status or the progress of a campaign.

The marketing and sales teams at a major global insurer were looking to boost their campaigns. Our personal automation assistant is helping the company enrich data, automate emails, and use real-time metrics to make better strategic decisions.

The Problem

Throughout the year, the company's marketing team was sending out hundreds of letters and emails to existing and potential customers. Were those customers interested in new products, or in upgrading their current products or policies? After marketing sent its correspondence and collected data, the company needed a tool to help sales agents in a call center comb through customer lists and engage with customers.

The trouble was: like many marketing and sales teams, there was no centralized system for sharing and storing customer information. Data handoffs between departments happened via Excel spreadsheets — a manual process that was time-consuming and error-prone. And the customer information in the spreadsheets didn't give sales agents much insight into what customers on the list might want or need.

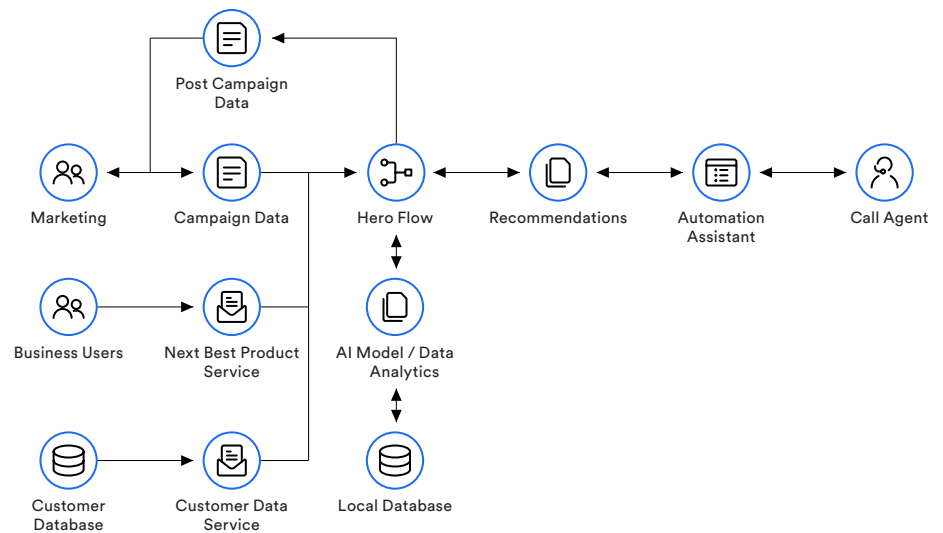
The Solution

Automation Hero is using our personal automation assistant to track the handoff of information between the company's internal teams. We're also using the assistant to give granular status updates and track communication with customers at every step.

Automation Hero's powerful virtual assistant acts as an integration between automation and humans. It can send out a task list in a simple email or it can be customized to integrate with a human worker's daily routine in some other way. Without development help, task lists can be changed as priorities shift on the fly. Whole teams can use the assistant to track the status of complex, long-running tasks.

A personal automation assistant keeps humans in the loop as tasks are completed.

The first step with the insurer: Automation Hero is using the insurance company's own databases to enrich data coming from the marketing team. We're showing each sales agent a customer record with details like the customer's age, past purchase history and the next best product they might be interested in.



Sales agents can also see the customer's status in the campaign — whether they've been contacted, the outcome of that contact, and whether there's a next meeting scheduled or the case has been closed. Sales agents can also save each sales agent precious minutes after each call by automatically generating a personalized follow-up email.

During a campaign, sales managers can gain valuable insights, including real-time metrics to show how successful each day was. At the end of a campaign, log data can be fed back to the marketing team for analysis.

What is Automation Hero?

Automation Hero's end-to-end automation platform for the modern enterprise combines screen scraping, structured and unstructured data processing, machine learning, and the human workforce. It's an operating system for automation — intelligently automating everything from simple tasks to complex business processes. This improves information worker productivity and drives more successful, optimized business outcomes. Its powerful backend focuses on three key areas: eliminating repetitive and time-consuming tasks, automating common asks and augmenting employee decision making.