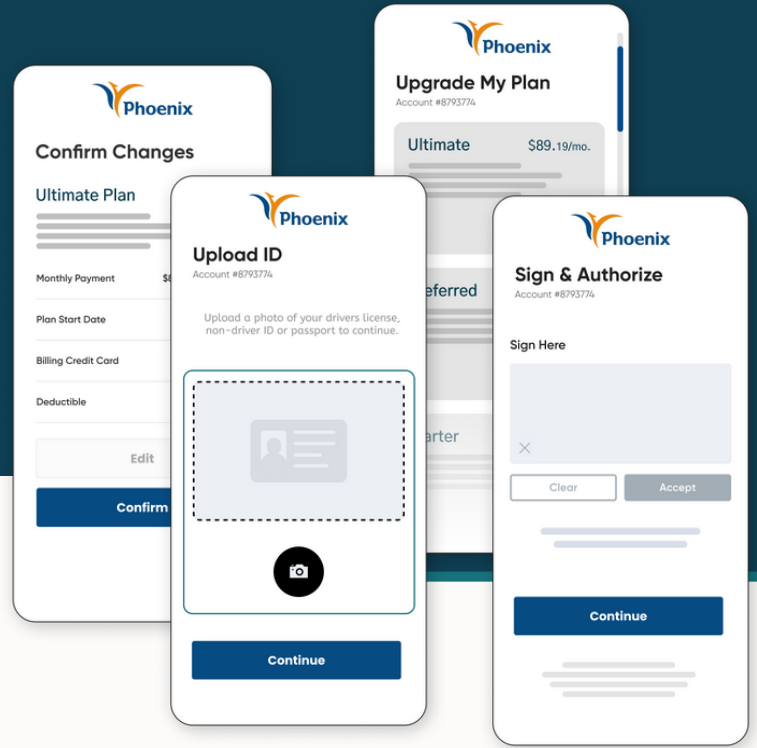


MASS FORM AUTOMATION CASE STUDY

Phoenix Insurance drives 40+ % reduction in agent-led calls with a bank of digital self-service forms.

Company boosts customer satisfaction and speeds outcomes with multiple digital micro apps and Visual IVR



Background

Phoenix Insurance is a leading Israeli insurer with \$60+B in assets. While a successful and growing business, the company's customer service operations relied on manual processes and a large number of manual PDF forms. The company wanted a fast and efficient way to replace manual processes and data transcription with a bank of digital experiences consumers could complete in self-service use cases.

The company turned to Callvu to orchestrate an omnichannel digital customer service solution that would lower costs, speed outcomes, and boost CSAT.

Program Goals

- Digitize key manual, PDF-based experiences to digital micro apps in year one
- Integrate visual IVR options across the company's most common use cases without requiring a new IVR menu or cCaaS solution
- Reduce inbound support calls by 20%+
- Facilitate real-time data exchange for form pre-fill and automatic customer profile updates based on input information
- Ensure micro apps could also be deployed in other channels to prevent more calls

Highlights

100+

Manual experiences automated in <3 months

90%+

Successful customer completion rate

\$3.5M+

Annual customer service cost savings

100%+

Increase in payment plan participation

Solution

Callvu leveraged contact records from the Phoenix call center to develop a recommendation for customer experiences most appropriate for digitization.

We focused on the most common and financially significant use cases, including payments, collections, new contract automation, and upsell/cross-sell use cases.

From there, our services team developed all more than 100 experiences, including security reviews, in less than three months.

Experiences were deployed and real-time analytics helped our team make dynamic experience adjustments to optimize completion rates.

All experiences and visual IVR workflows were live by month four.



Results

Callvu's 100+ micro apps for Phoenix drove a 40% reduction in agent-led calls by the end of year one.

Every experience developed had a 90%+ successful completion rate without human assistance.

The experiences were integrated with all relevant Phoenix internal data systems within four weeks using Callvu's innovative API gateway.

Payment and collection apps boosted customer engagement by 5X and insurance contract apps sped time to completed applications by almost 9 full days.