

Case Study



**Journey Approach Improves Fortune 200
Insurance Company's KPIs and CX Rating**

Hank Brigman's
CUSTOMER EXPERIENCE
STRATEGIES, INC

Who: The company

\$20 Billion USD insurance company.

What: The problem/opportunity. Improve CX to improve business results

To improve its competitive position and business results in a complex and competitive market with a one year policy duration, a large insurance company decided to focus strategically on improving customer experiences.

It was known that there were silo-based inefficiencies that increased cost-to-serve and hurt service journey efficacy. To date, the company's Net Promoter Score® trailed industry leaders and it languished in the middle of Forrester's CX Index.

How: The path to a solution. A journey approach focused on purpose

The company adopted a Journey approach to internally change hearts, minds and actions and improve results.

Extensive research applying *jobs to be done* methodology was conducted to identify customers primary service journeys and the purpose of each.

With six primary service journeys identified, the organization changed the name of each to be based on customer purpose vs. company actions.

A permanent service journey owner, manager and team was assigned to each on a staggered schedule. This journey approach structure was layered over the company's departments.

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Journey approach focusing on purpose improves KPIs and company tops the CX Index

Changing the “names” of service journeys returned powerful results. For example, their “payments” service journey (collecting monthly premium payments) was renamed “maintain eligibility.” While the company was collecting payments, the customers’ purpose in making the payment was to maintain their eligibility for the insurance coverage.

Evidence shows that renaming each of the six service journeys changed hearts, minds and actions. For maintaining eligibility, just changing the name improved related *first call resolution and transactional NPS*. There are those who believe that the name change improved cash flow.

As the company continued their journey approach implementation, they rose from the middle to the *top of Forrester’s CX Index*.



Questions?

Let's chat – I am happy to help. Feel free to grab some time on my calendar:

[Link to Hank's calendar](#)

Or submit the form found here: [Contact Hank form](#)

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