



Best Practices
for Agency Operations
Webinar Series

Agents Council for Technology "ACT" Presents The Customer Experience Lifecycle
Ron Berg / IIABA

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Reagan Consulting

Independent Insurance Agents & Brokers of America, Inc.

Best Practices enhance agency value

ACT and the CX

- Big "I" program bringing IA stakeholders together since 1999
 - Carriers, vendors, agents & brokers, UGs, associations
- Advancing effective:
 - Technology workflows, business processes
- Our Goal: Consensus on best workflows, advocacy using Work Groups

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Reagan Best Practices

Understanding the Customer Experience

Customer Expectations are *CHANGING*

Forces at Work:

- New Behaviors
- New Technologies
- Competitive Pressure
- New Buying Journey

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Reagan Best Practices

Understanding the Customer Experience

First; MOBILE

- > **85%** of insurance shopping now starts on mobile
- > **66%** depart if not optimized
- > Google now ranks "mobile-usability" higher
- > **92%** of smartphone time is spent with apps.

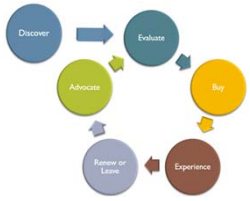


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Roagan Best Practices

Understanding the Customer Experience

Six phases, critical touchpoints



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Roagan Best Practices

CX Journey – Phases

- 1) Discover** – Create awareness
Examples: Mobile-adaptable websites, SEO, Find-an-Agent
- 2) Evaluate** - Generate favorable consideration
Examples: Solid website, compare rates, use testimonials
- 3) Purchase** – Make it easy, show your agency's experience
Examples: Online chat, eSignature, EFT or CC pay

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CX Journey – Phases

4) **Experience** – Establish a bond, deliver noticeable value
Examples: Mobile acct mgmt, website education, proactive

5) **Renew** – Reinforce affiliation via proactive engagement
Examples: Online rate check, positive claims experience




6) **Advocate** – Leverage the fan base you've established
Examples: Website review, video testimonial, blog

The ACT 'CX' Website

Resources:




ACT CX Journey Recommendations document
New: Free interactive online planning tool
<https://www.independentagent.com/ACTCX>

The ACT 'CX' Website

Quick review of online resource




<https://www.independentagent.com/ACTCX>


  

The ACT 'CX' Website

Coming next:
Adding **agency CX assessment & planning**

<https://www.independentagent.com/ACTCX>


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QUESTIONS?

Thank you!

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