

Grange Insurance Success Story





Dynamics CRM Customer Story

Grange Insurance Strengthens its Hassle-free Customer Service with CRM

CUSTOMER PROFILE

Grange Insurance, founded in 1935, now works with over 4,000 independent agents across 13 states. Grange Insurance is based in Columbus, OH, and manages over \$2 billion in assets.

INDUSTRY

Financial Services

LOCATION

United States

CHALLENGE

Since its founding in 1935, Grange Insurance has aspired to offer its customers a hassle-free insurance experience that's personal and relevant to their needs. But that's a tall order when you're serving more than 750,000 policyholders through more than 4,000 independent agents across 13 states. That's why Grange turned to Hitachi Solutions and Microsoft Dynamics CRM to transform how Grange interacts with and serve its customers.

Craig Borens, the AVP of Customer Care at Grange Insurance, knows how big that challenge is. "Last year, we handled about 565,000 calls in our contact center," he says "and that's on track to go up 5% this year." In order to serve each client, the customer service representative (CSR) needs to access a huge amount of information when a client calls in. They need to know who the client is and what policies they have with Grange. They need to know which agents the policies were purchased through, when they were purchased, whether the payments are up to date, and when those payments were made. In addition to policyholders, the contact center serves agents in Grange's network, which means that the CSR may need access to additional information about each agency and their relationship with Grange.

But accessing that information wasn't always easy. In the past, CSRs had to use a variety of different systems through several different tools and applications. "If the customer had an auto policy, it was in our auto system, and a life policy was in our life system. There was no single place that we could take all that information and populate it," says Borens. And if the client had a question about their payments, the service agent would have to access another system to get that information. The entire process was inefficient and made it hard for contact center staff to do their job. The system also had limited recording and reporting capabilities. Borens and his team didn't have good visibility into what kinds of calls were coming in and how they were being handled.





SOLUTION

“We save seconds on every call, and we capture way more information. That’s a huge benefit.”

Craig Borens, AVP of Customer Care for Grange Insurance

Grange knew that it needed to do something to give CSRs easy access to the data they need to do their jobs and streamline service in their contact center. Grange opened up an RFP process and invited leading vendors to submit a proposal for a CRM solution. The request had three essential requirements:

- First, CSRs needed to be able to see all of a policyholder’s information on one screen, including policies, contact info, selling agent, and so on.
- Second, that information had to pop up on the CSR’s screen at the start of the call without the CSR having to hunt for it.
- Third, the CSRs had to be able capture and archive the entire interaction for compliance purposes.

After a rigorous competitive process, Grange selected Dynamics CRM as the solution that could best address all of Grange’s requirements.

During the RFP process, Hitachi Solutions worked closely with Grange to craft a solution that fit Grange’s needs, running a two-week solution lab where Hitachi worked directly with the Grange team. “They did a really good job of understanding what we needed to accomplish and the timeline to accomplish it,” says Borens. Hitachi presented a solution demo that built on the core Microsoft Dynamics CRM but added IP and customizations for common insurance requirements and Grange’s own processes.

“They made us feel very comfortable that if we went with Dynamics and Hitachi, we would get the application we really needed based on our business requirements.” Integrating CRM with the policy and other back-end systems was a big part of the solution. Says Tap Haley, Director of Insurance at Hitachi Solutions, “We implemented our agent desktop solution so that when a call comes in, it looks at all the policy admin systems to find policies for that caller and presents them to the CSR inside of CRM.”





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Now with the Hitachi solution, when a call is routed to a CSR at Grange’s contact center, a window automatically pops up with all that client’s data: their contact information, service history, and all the policies that policyholder has with Grange. With all the information on hand, the service agent can focus on giving that customer the best possible service. Customer service is faster and more efficient.

BENEFITS

Since Hitachi customized Dynamics CRM for its insurance business, Grange has been able to serve its customers better and faster, thereby enabling Grange to obtain valuable insight into its customer service organization. “We save seconds on every call, and we capture a lot more information,” says Borens, “That’s a huge benefit.”

CRM gives Grange far better visibility into the performance of the contact center. Says Borens, “we can monitor who created a case, who it was assigned to, and how long it took to completion.” Not only does this help Grange ensure it is maintaining its expected service level standards, it means Grange can identify trends and patterns that might highlight a recurring issue or an opportunity for improvement. It can better measure customer satisfaction, see how long it takes to resolve calls, and balance the workload between CSRs.

CRM also gives Grange insight into what types of calls it receives. “One of the things that CRM did for us is that it very clearly articulated how many calls we got on this particular subject in this period of time. Now we can look at the volume by category and ask what’s causing that volume,” says Borens. Grange can use this data to help understand changes in the business. For example, when new self-service capabilities are added to the customers’ online My Grange portal, Grange gain insight into the impact the CRM has on call volumes. Grange can also better forecast call volume. By looking at past patterns, the contact center can predict how high the volume will be in the future and plan resources accordingly, leading to further efficiencies.

Grange has further plans to extend its CRM implementation throughout the company, giving everyone that same unified view of the policyholder.



CONCLUSION

At Grange Insurance, giving their customers and agents a streamlined service experience is a top priority. Hitachi Solutions CRM for Insurance built on Microsoft Dynamics CRM helps Grange achieve this goal and has given it room to expand its use of CRM to find more efficiencies in the future.

