oneCXi | LifeShield
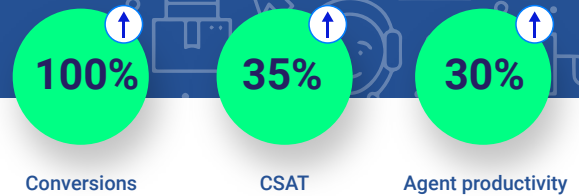
How oneCXi Drove 100% Higher Conversions and 35% CSAT Growth for LifeShield

Use Case: Sales, Customer Service | Industry: Insurance | CRM: HubSpot

100% Conversions

35% CSAT

30% Agent productivity

Objective

LifeShield faced poor connection rates, delayed lead responses, and inefficiencies in managing policies and claims. These issues significantly impacted conversions and customer satisfaction during crucial periods.

Solution

LifeShield leveraged oneCXi's unified solutions to streamline lead management, automate queries, and provide real-time monitoring, significantly improving operational efficiency and enabling meaningful interactions.

Results

With oneCXi, they increased connection rates and doubled conversions. Customer satisfaction increased by 35% due to faster response times and enhanced service quality, while agent productivity improved by 30%

About the Company

Founded in 2010 in Kentucky, United States, LifeShield is a brokerage established by its parent company, Insurance Brokers Group. Its mission is to simplify the complex world of traditional and specialty life insurance products for families. From lead capture and cold calling to customer care, LifeShield exemplifies what insurance companies must do to survive in a highly competitive industry. It was keen on improving its conversion rate through outbound campaigns while enabling higher agent efficiency.

How to Enhance Workflow Efficiency to Boost Conversions and Elevate Customer Service?

LifeShield needed a CX partner with robust CCaaS features that could seamlessly integrate with their CRM. They aimed to achieve higher connection rates by ensuring agents only connected to live conversations, minimizing wait times. Their previous vendor lacked critical dialer capabilities, resulting in mediocre connection rates, poor call quality, and the absence of real-time reports. These issues significantly impacted conversions during the enrollment season, highlighting the need for a more efficient and reliable solution to enhance their customer experience and drive better results.

Features: Auto Dialer | Screen Pop | Smart IVR | Real Time Monitoring

Accelerating Lead Conversions with Robust Dialer-CRM Integration

With oneCXi's dialer capabilities, LifeShield efficiently reached out to nearly 4,000 prospective customers, tripling their connection rates—a marked improvement from their previous telephony solution. The robust integration between oneCXi dialer and their CRM streamlined lead dialing and connection, while automated disposition features accelerated lead response times and ensured efficient follow-ups. This approach facilitated meaningful conversations during the critical enrollment season and resulted in a twofold increase in conversions, showcasing the impact of the new partnership on their sales performance.

Elevating Insurance Support through Smart IVR Solution

Earlier, the company faced challenges in tracking and managing customer interactions across multiple channels, leading to inefficiencies in processing policy updates and handling claims. This resulted in delayed responses and a decline in customer satisfaction. To address these issues, they implemented oneCXi's smart IVR solution that automated 50% of queries related to policy updates, claims, and renewals. Additionally, the system efficiently routed complex inquiries to skilled agents for personalized and swift resolutions. This approach significantly increased operational efficiency and boosted customer satisfaction by 35%.

Enhancing Efficiency and Gaining Insight with Real-time Monitoring

With oneCXi, LifeShield's agents gained the ability to connect, respond, and transfer conversations directly from within the CRM window, enhancing their efficiency. The system automatically logged call recordings and chat transcripts from each customer interaction, ensuring comprehensive record-keeping. Additionally, oneCXi provided instant notifications for abandoned calls, enabling prompt follow-up. Real-time monitoring and detailed reporting provided valuable insights into customer interactions and agent performance, enabling LifeShield to optimize their strategy for more informed decision-making.

Boosting Agent Productivity with Advanced CCaaS Features

Previously, agents had to switch between multiple systems to access necessary information during customer interactions, leading to workflow interruptions. With the integration of oneCXi's screen-pop features, agents gained automatic access to relevant CRM data while speaking to a prospect or a customer. The click-to-call functionality further streamlined the communication process, facilitating quicker connections. This streamlined approach eliminated the need for system switching, significantly improving the agent experience and boosting overall productivity by 30%.

Benefits & Overall Impact

With oneCXi, LifeShield transformed its operations by streamlining lead management and automating policy and claim processes. These improvements led to faster response times, higher customer satisfaction, and a notable increase in conversions, driving stronger overall business outcomes.

- 100% Higher Conversions
- 35% Improvement in CSAT
- 30% Increase in Agent Productivity
- 50% Queries Automated

About oneCXi

oneCXi is an industry-leading unified customer experience intelligence (CXi) platform that helps enterprises engage, convert, and retain customers, at scale. The AI-engineered platform empowers businesses to orchestrate journeys across a multitude of touchpoints, power billions of personalized conversations, and gain a 360º view of customers across the lifecycle. 3,500+ global brands trust oneCXi to capture the pulse of customers, drive cohesive experiences, and increase lifetime value.

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