



## Erie Insurance Uses Plum Voice IVR Surveys to Boost Customer Retention, & Improve Customer Satisfaction

### About



Erie Insurance Group is a Fortune 500 insurance company, based in Erie, PA. The company offers home, auto, and life insurance products to over four million customers in twelve different states.

The Erie Insurance claims division needed to upgrade their customer feedback program from a manual process to an automated one. ERIE added a voice channel to its customer survey process. The IVR survey provided ERIE with actionable data that informed the company about their customers' claims experiences. This information also provided valuable insight for enhancing customer retention, improving customer service and sales procedures, and better educating customers on their coverage.

Founded in 1925, Erie Insurance is a Fortune 500 company that offers auto, home, and life insurance products to over four million people in twelve different states. The company's claims division is one of its customer-facing wings and uses surveys to gauge customer satisfaction. These surveys are deployed over the phone using an IVR system, and via the web.

### The Problem

ERIE's claims division uses customer surveys to obtain feedback on the company's service. This originated as a manual process that involved sending surveys to customers via the post. According to Barbara Lincoln, ERIE's Director of Business Integration and Claims, they received back 4,900 responses per year, on average. Between the cost of postage, paper, and labor to get these surveys out into the world and back, the ends didn't justify the means. Even with completed surveys, the manual process lacked an efficient way to analyze and share the data they received. This meant feedback remained primarily anecdotal and under-utilized.

The desire to keep up with advances in technology motivated ERIE to mature its manual process for a web-based approach. The company also incentivized customers to take the survey by offering \$100 prizes selected at random from the pool of respondents. The response rate jumped to 7% after the switch, but ERIE realized having a web-only survey may place people without or unfamiliar with computers at a disadvantage. Adding a telephone survey option leveled the playing field. More people were able to respond and therefore be included in the incentive drawing for surveyed customers.

### The Solution

Lincoln noted her company did some research and found that "Plum was the best known in the industry for IVR" and Maritz also recommended the company to ERIE. It was also an advantage that the company ERIE selected to deploy its web surveys, ConfrmIt, is also a Plum partner. Because ERIE already used a web survey the task at hand became translating it to the voice channel. ConfrmIt was instrumental in designing and building the survey. ERIE highly valued their combination of strategic and operational skills.

“We conduct regular reviews of all of our vendors and we’ve never considered changing. The reason is that Plum is consistent and credible.”

**Barbara Lincoln**, *Director of Business Integration and Claims*

Not only has ERIE received positive feedback from its customers about the phone survey, but the company gets the actual data from the surveys quickly. Each night the voice application automatically sends that day’s data to the company’s web dashboards.

### The Results

The bevy of data now available to ERIE generated real change at the company. Now instead of receiving 4,900 survey responses per year, the voice channel alone garners about 1,000 per month. While the actual response rate declined from the manual process, the volume of responses increased drastically.

The nightly data transfers enabled ERIE to tie customer feedback to specific customer service representatives. The company established a customer satisfaction index (CSI) metric and tied it to CSR bonuses. The CSI gets updated daily and pushed out to over 300 claims management personnel in real-time. ERIE’s claims division places great value on having easily sharable, actionable data.

First, the ability to obtain survey data quickly enables ERIE to respond to customer feedback within 24 hours. Not only did customers appreciate the quick turnaround, but Lincoln said in some cases customers were actually surprised at the pace of follow-up as a result of their survey comments. This practice supports the claims division’s customer service and retention efforts.

Next, data produced by the phone surveys provided ERIE’s CSRs with a more accurate understanding of what upsets customers. This insight led ERIE to revamp several procedures in the claims department, like advising CSRs to employ a more sympathetic disposition when dealing with customers who experienced a loss. Maintaining a customer-first mindset with this information led ERIE to design detailed training materials for taking loss notices. These materials stressed the importance of avoiding a clinical, data-first approach, when talking to customers, and replaced that with an empathetic approach. The inspiration for this change came from customer feedback, particularly that obtained via phone surveys.

Finally, customer survey data also helped the claims division better understand a common pain point. Many times customers don’t completely understand their coverage until they make a claim. When the coverage isn’t what customers expected this often leads to frustration. The claims division, using customer feedback, realized this issue often originates in the sales process. Using actionable data, the claims division identified the most common area customers didn’t understand about their coverage and shared that information with the sales and training divisions.



Plum Voice makes interactive voice response (IVR) more effective, providing organizations with the tools and control they need to develop, measure and improve voice applications for great caller experiences, improved contact center ROI and lower overall customer service costs.

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