

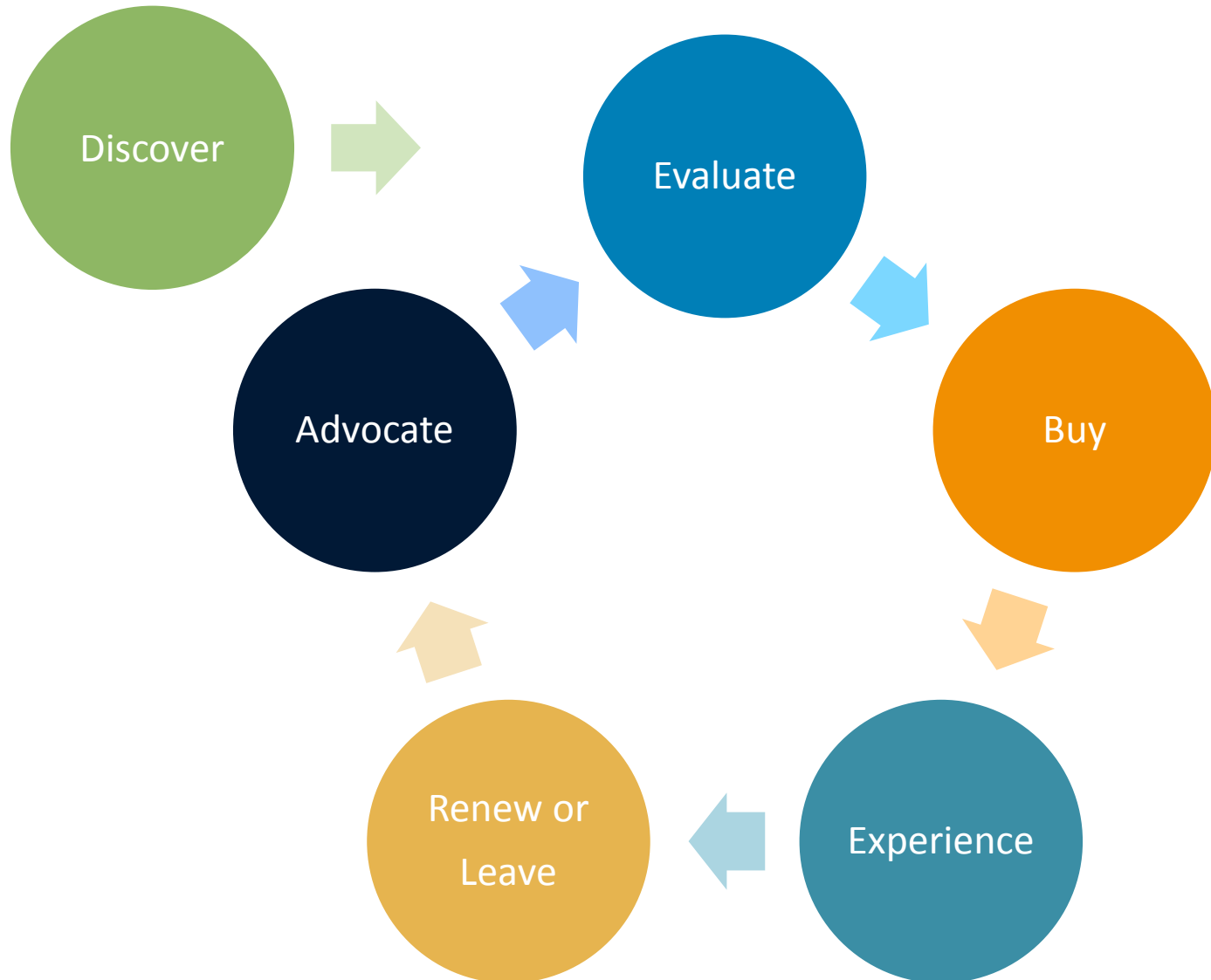


# Customer Experience Journey

Observations from the Field

# Meeting Agenda

- Customer Journey Overview
- Our View of the Data
- Solutions
- Q&A





# The Customer Journey



## Discover

Create awareness



## Evaluate

Generate favorable  
consideration



## Buy

Make it easy, demonstrate  
the experience you will  
deliver

# The Customer Journey



## Experience

Establish a bond, deliver noticeable value



## Renew or Leave

Reinforce affiliation through proactive engagement



## Advocate

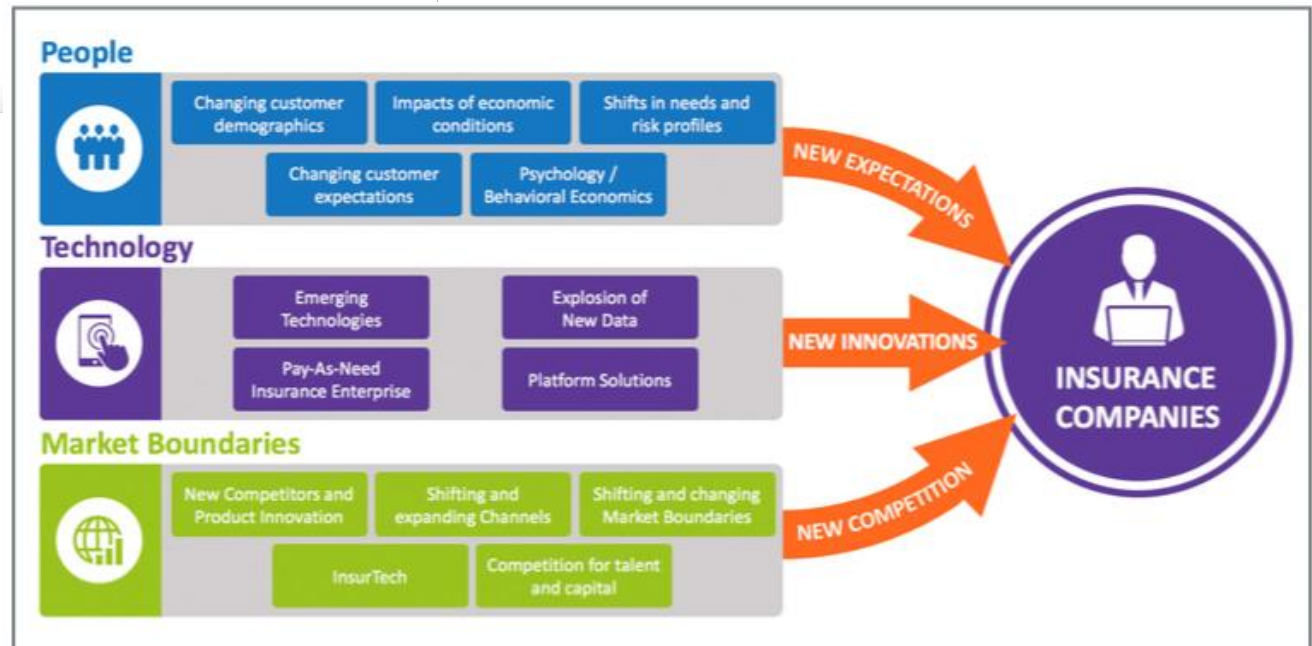
Leverage the fan base you've established



# Future Trends 2017

The Shift Gains Momentum

February 2017



# People



Changing customer  
demographics

Impacts of economic  
conditions

Shifts in needs and  
risk profiles

Changing customer  
expectations

Psychology /  
Behavioral Economics

Majesco: Future Trends 2017



But wait....

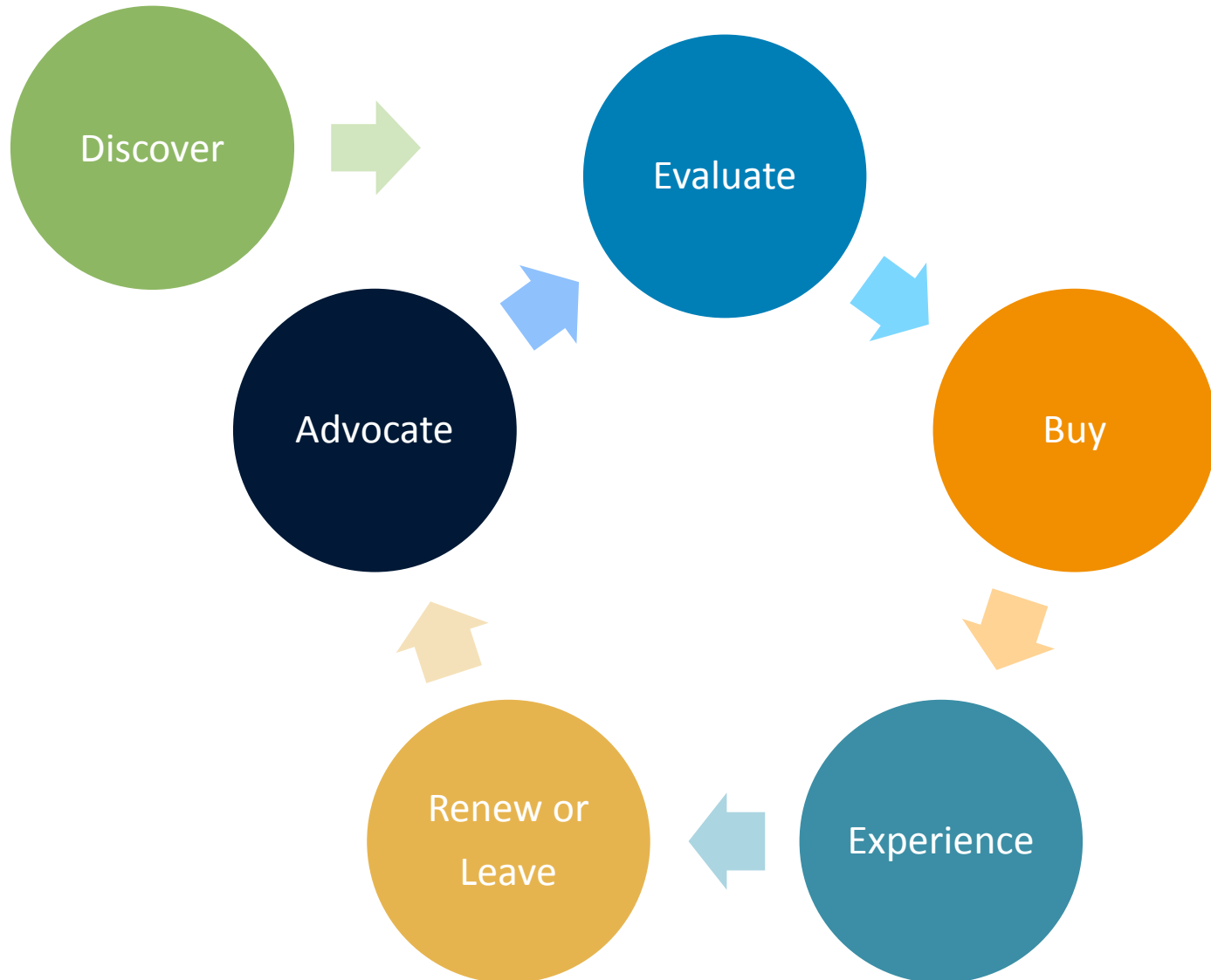
**Personal  
Lines**

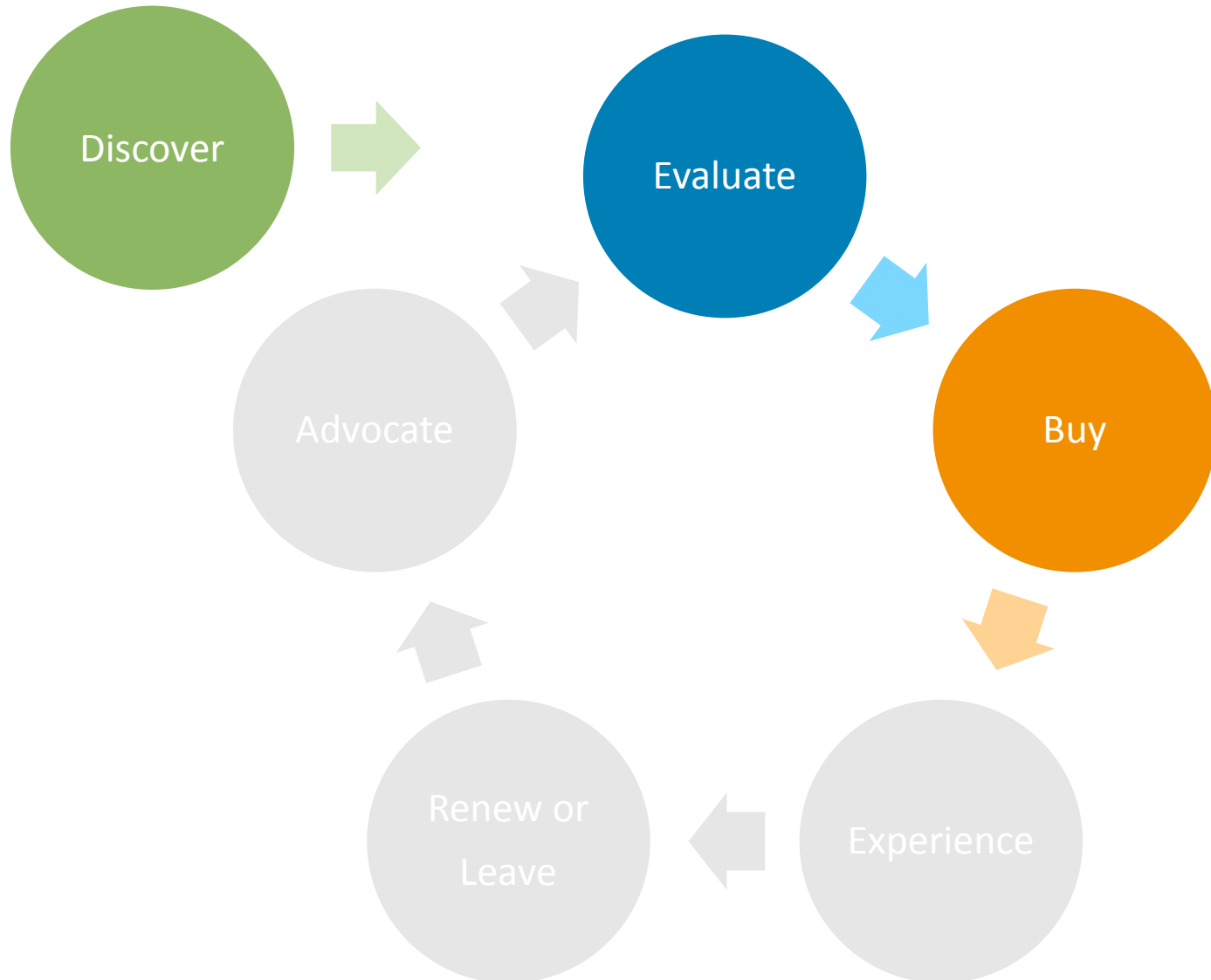


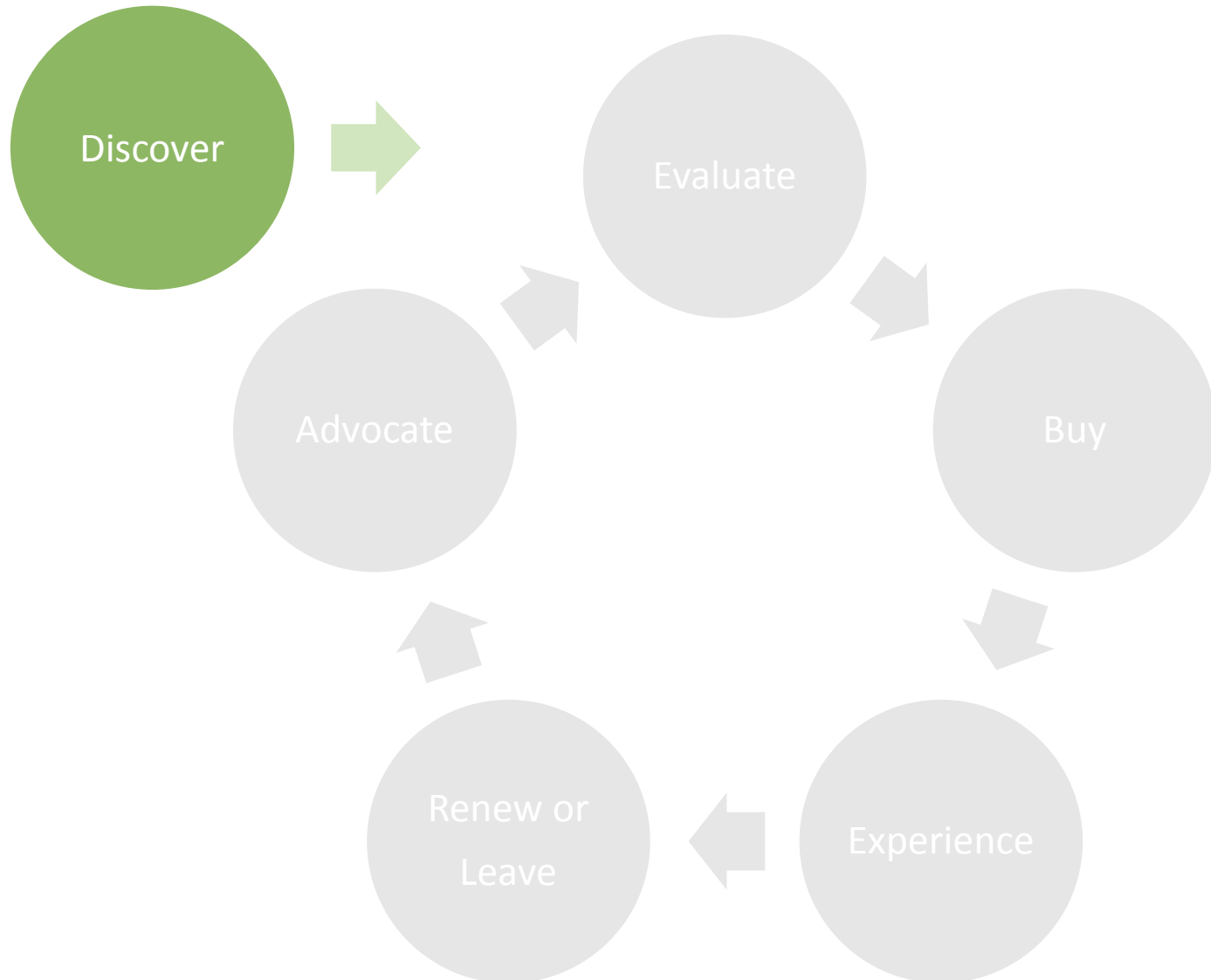
# Small Commercial Insurance: A Bright Spot In the U.S. Property-Casualty Market

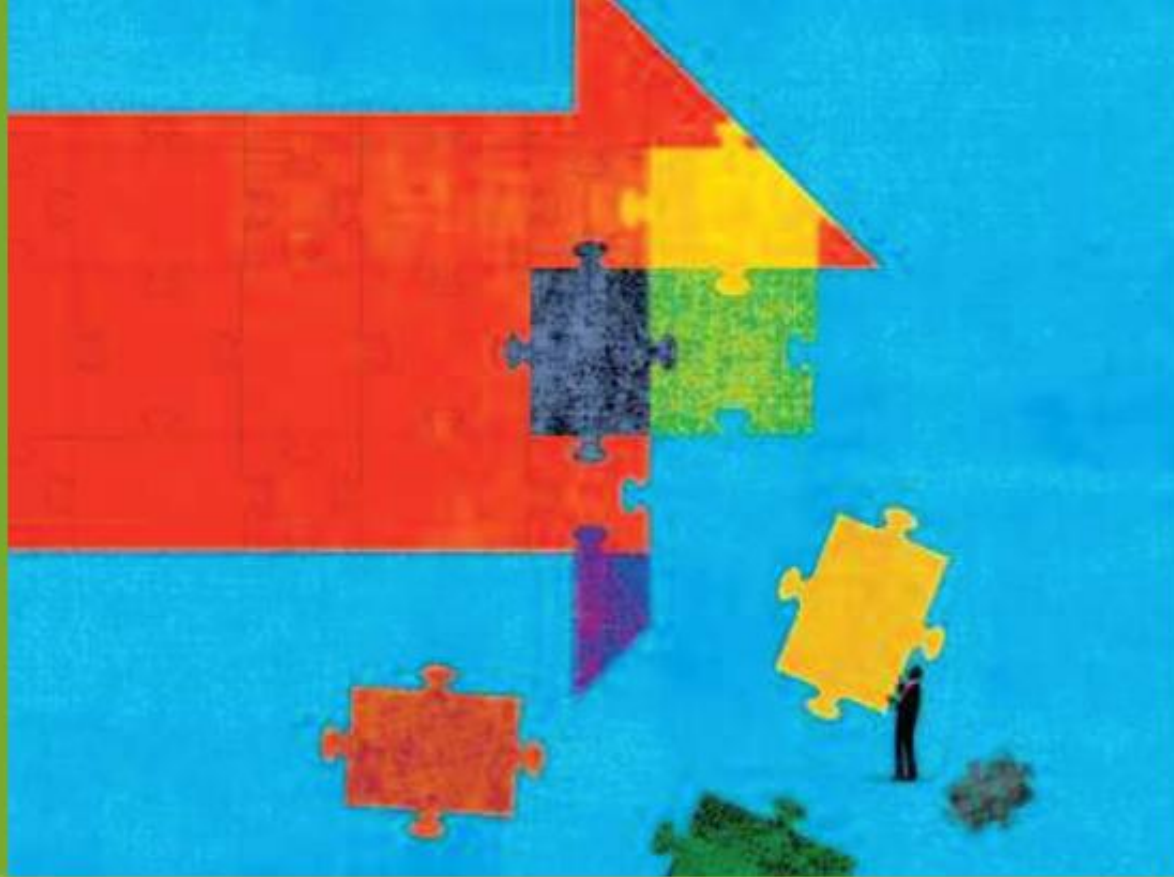


# The Data

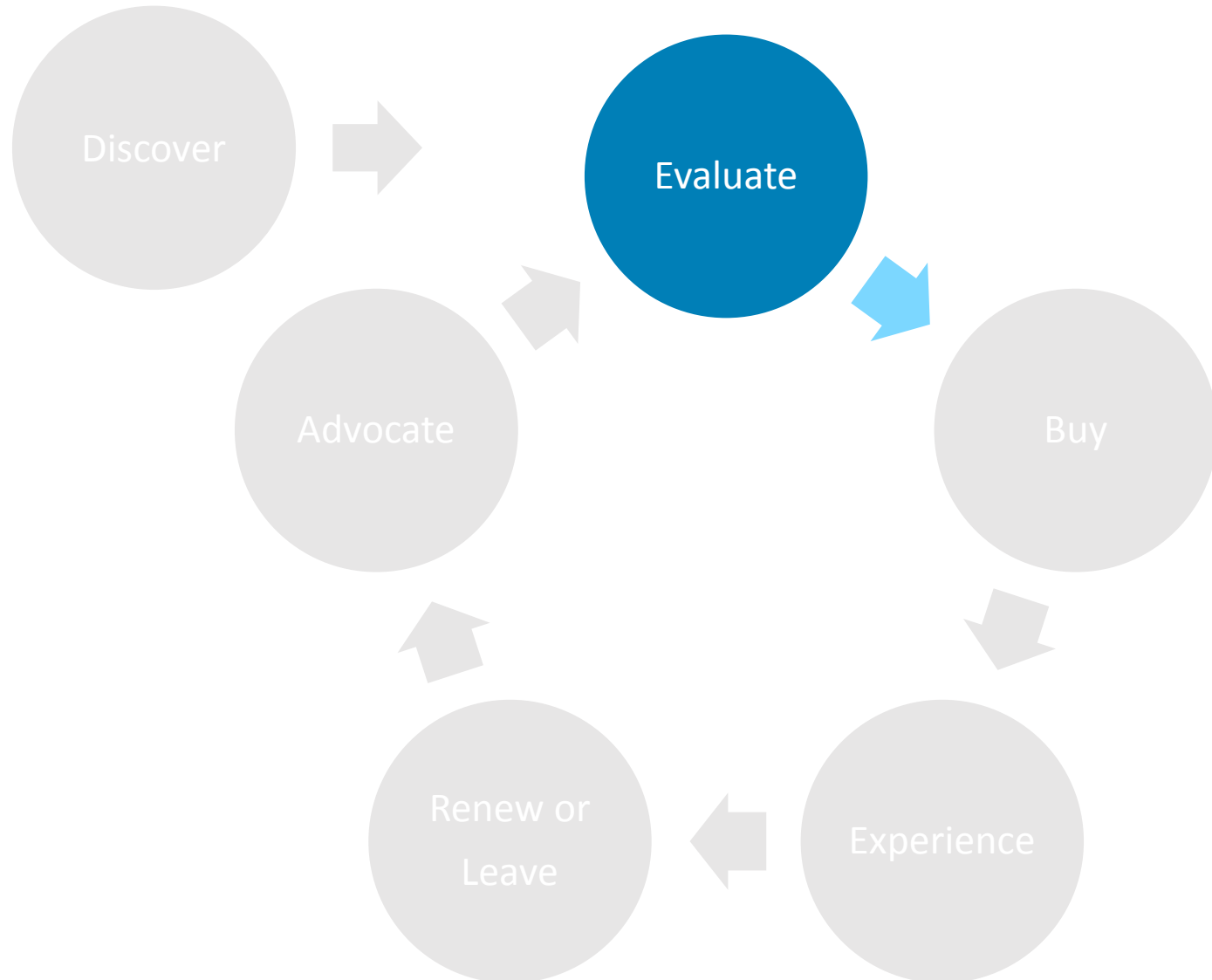






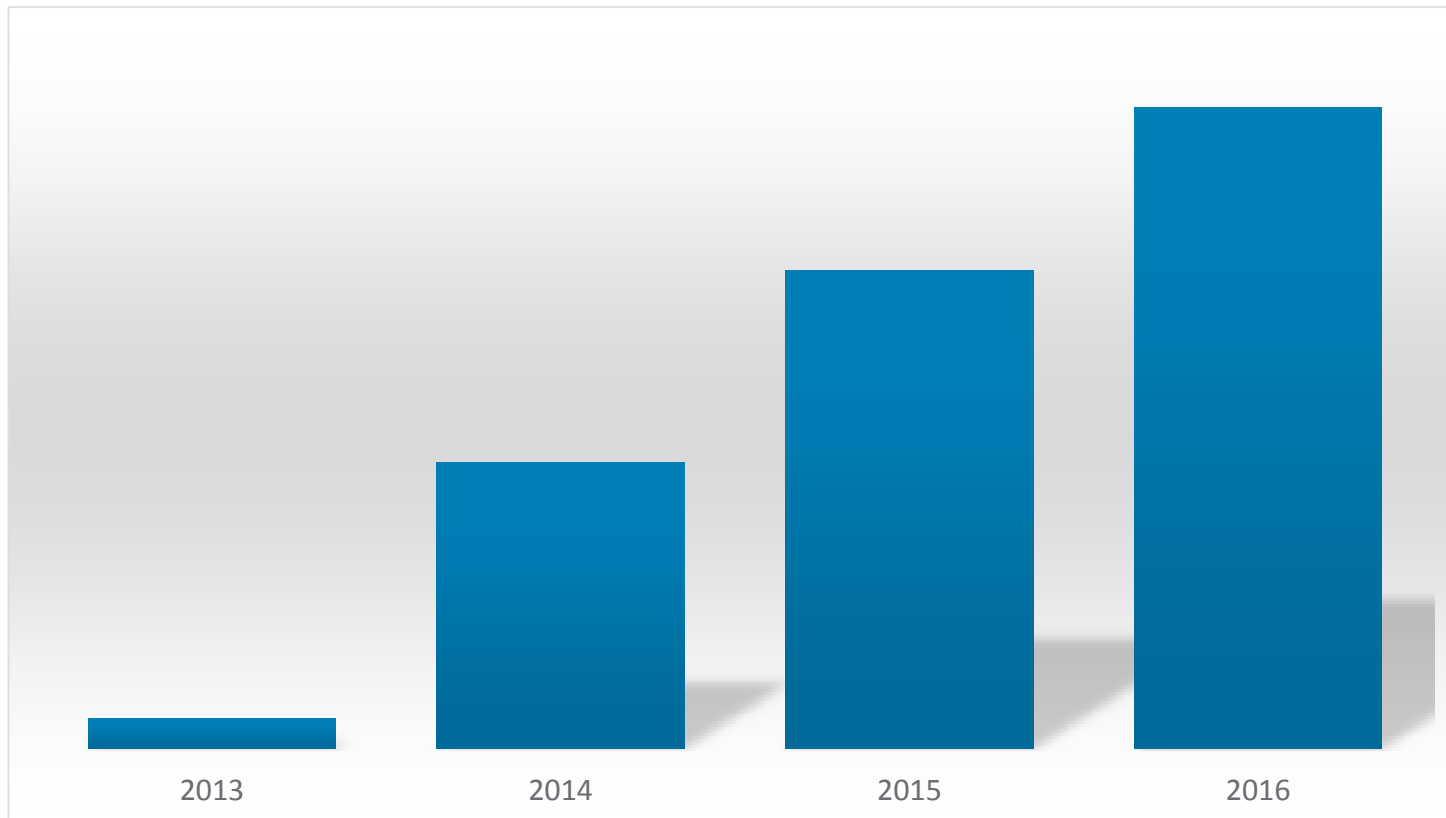


# Agents of the Future: The Evolution of Property and Casualty Insurance Distribution





# TrustedChoice.com Traffic Growth



# SmartMedia Data Integration



1ST PARTY DATA

+

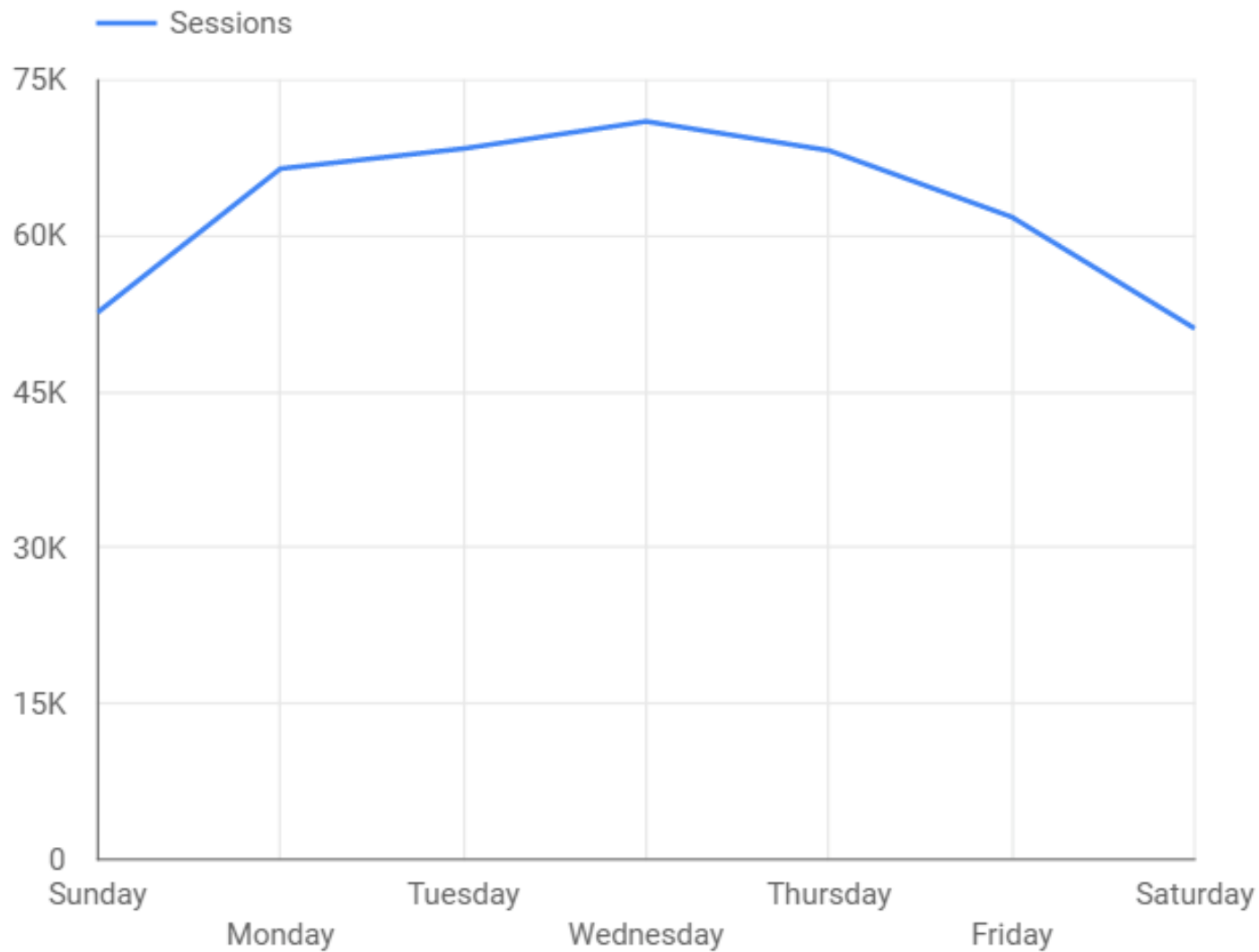


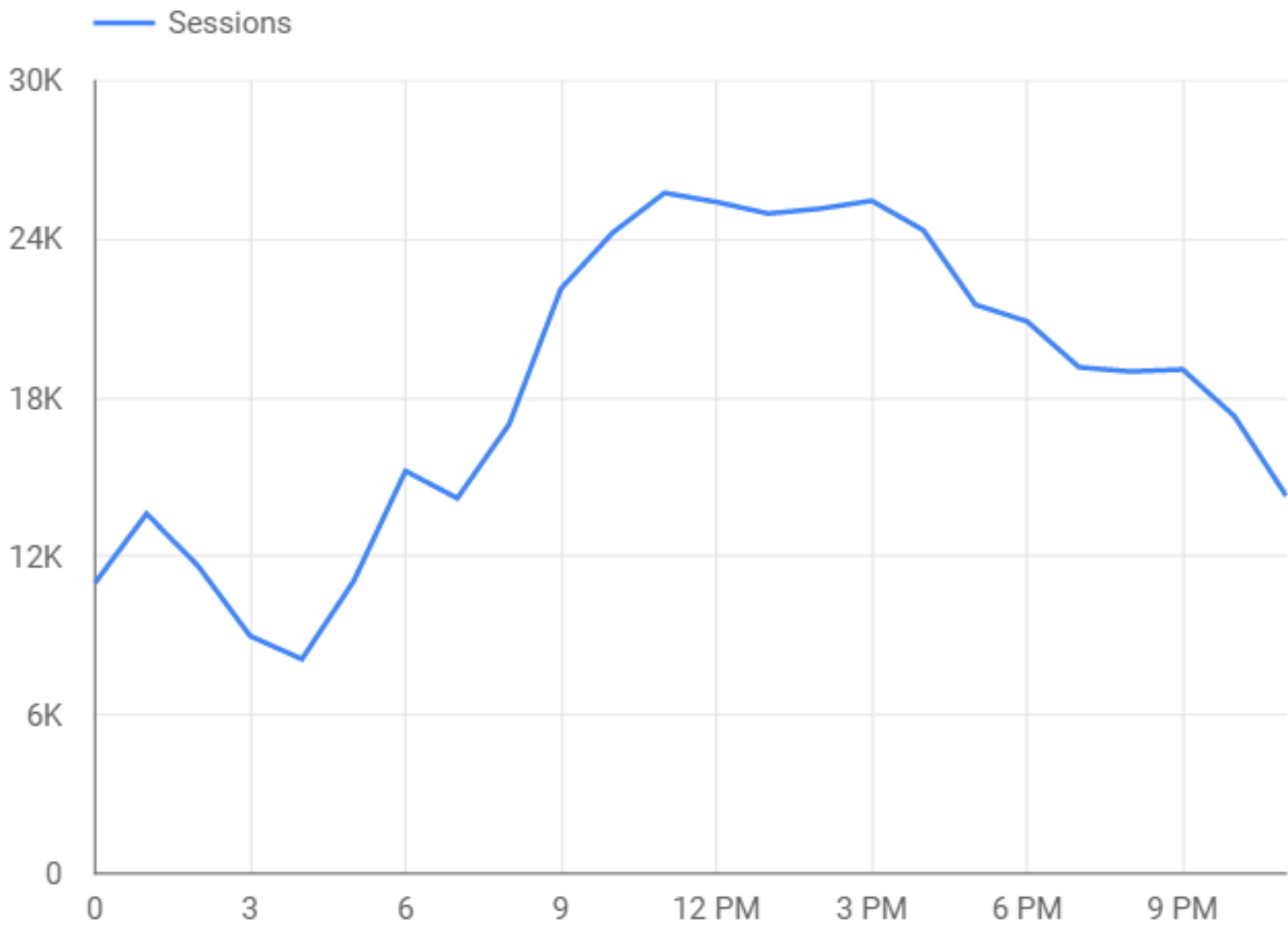
3RD PARTY DATA

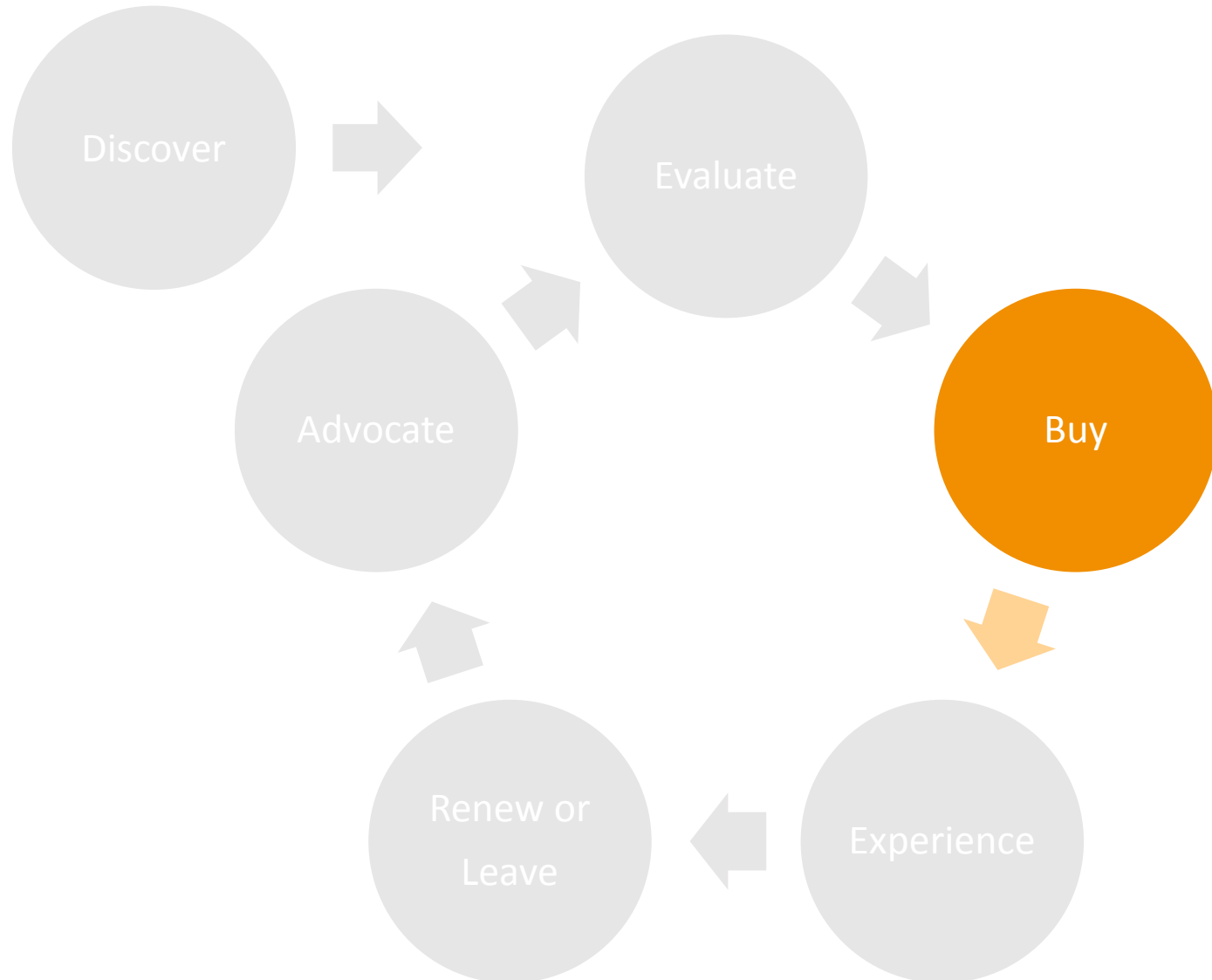
=



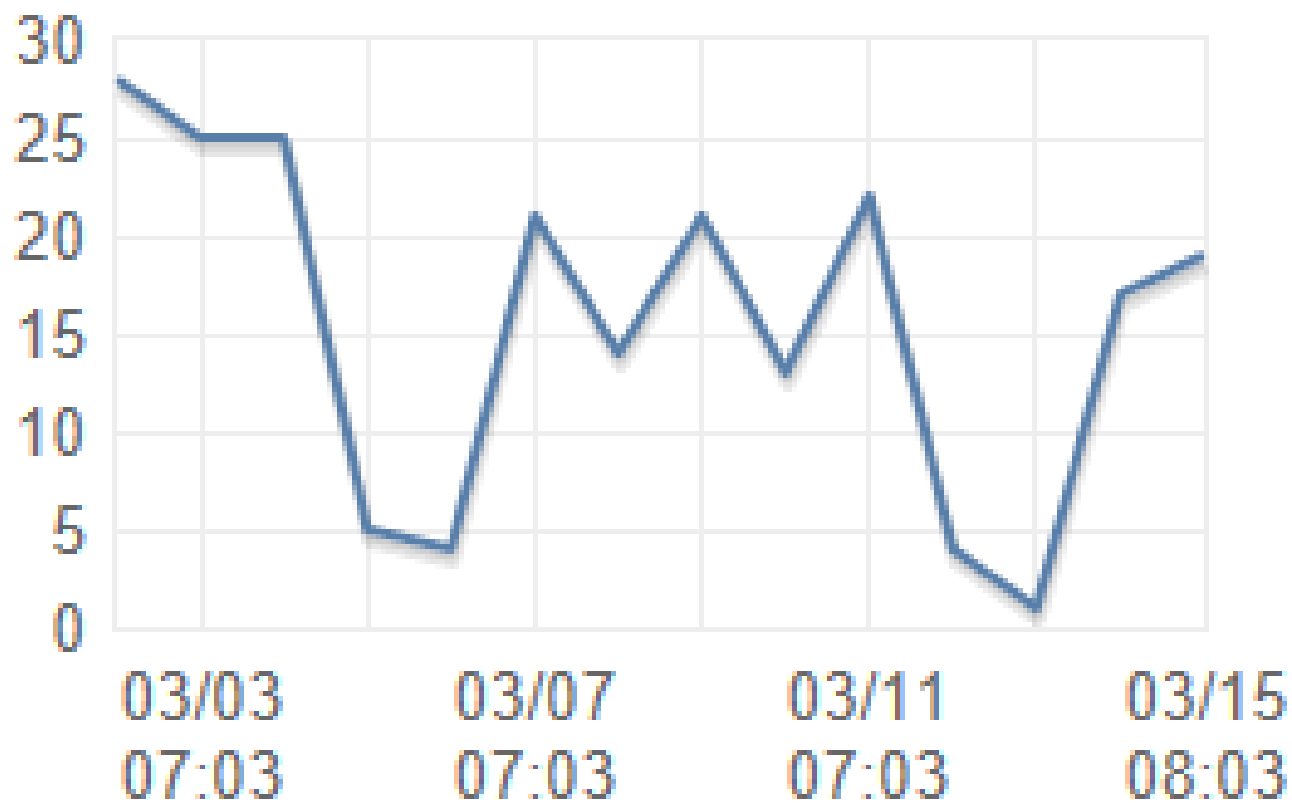
CUSTOMERS



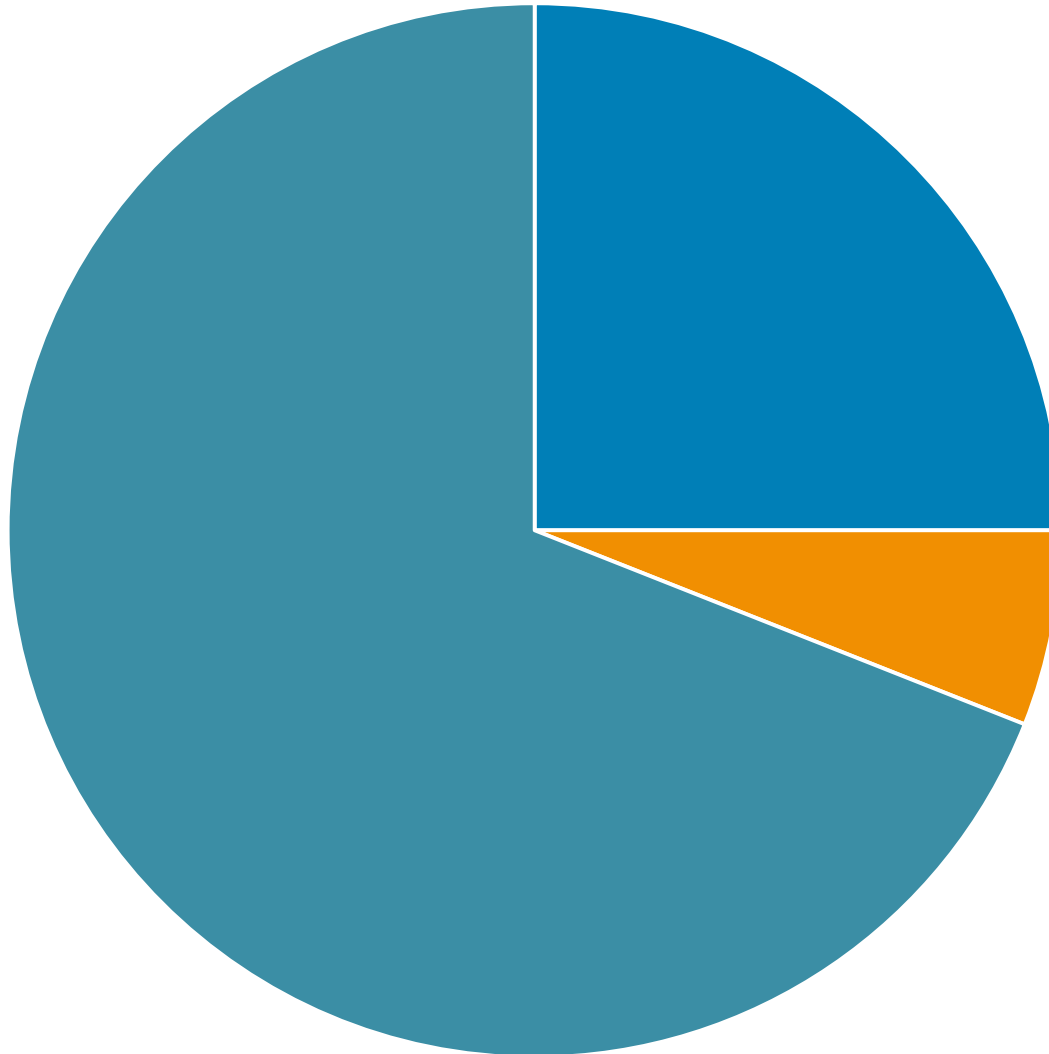




## Bounces (number)



## Inbound Calls





Please Call Back



Outside Normal Hours



High Volume

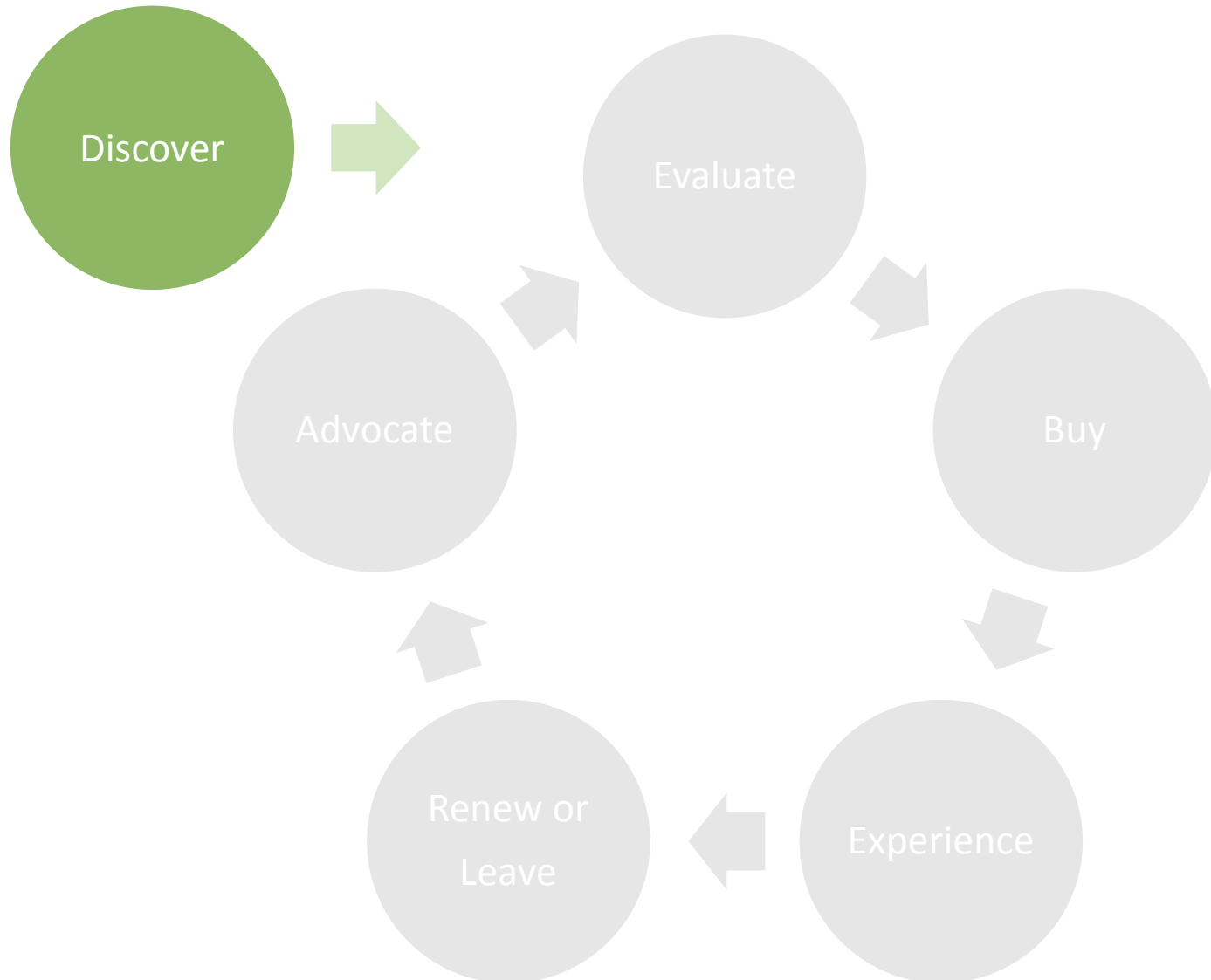


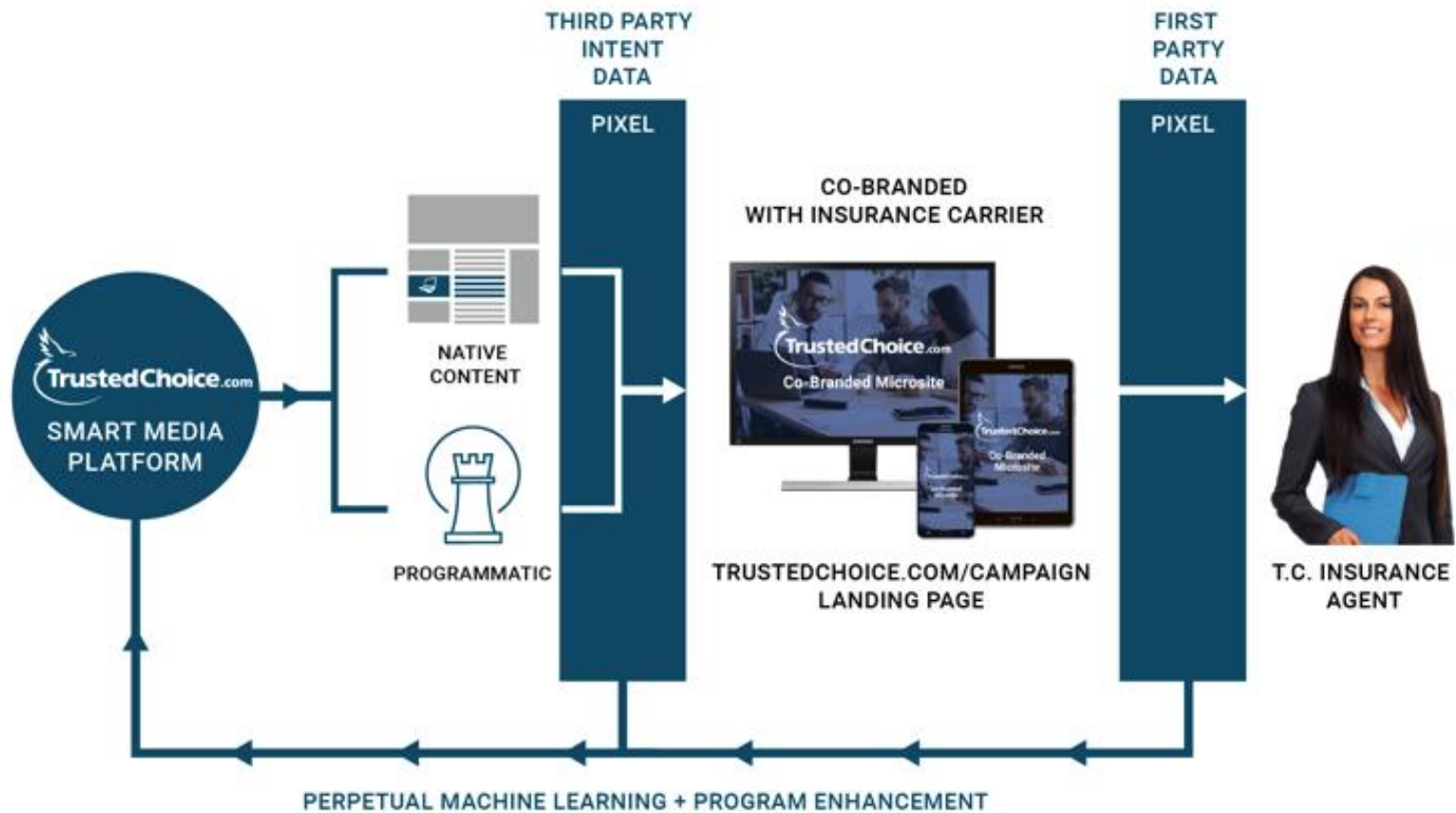
Leave A Message

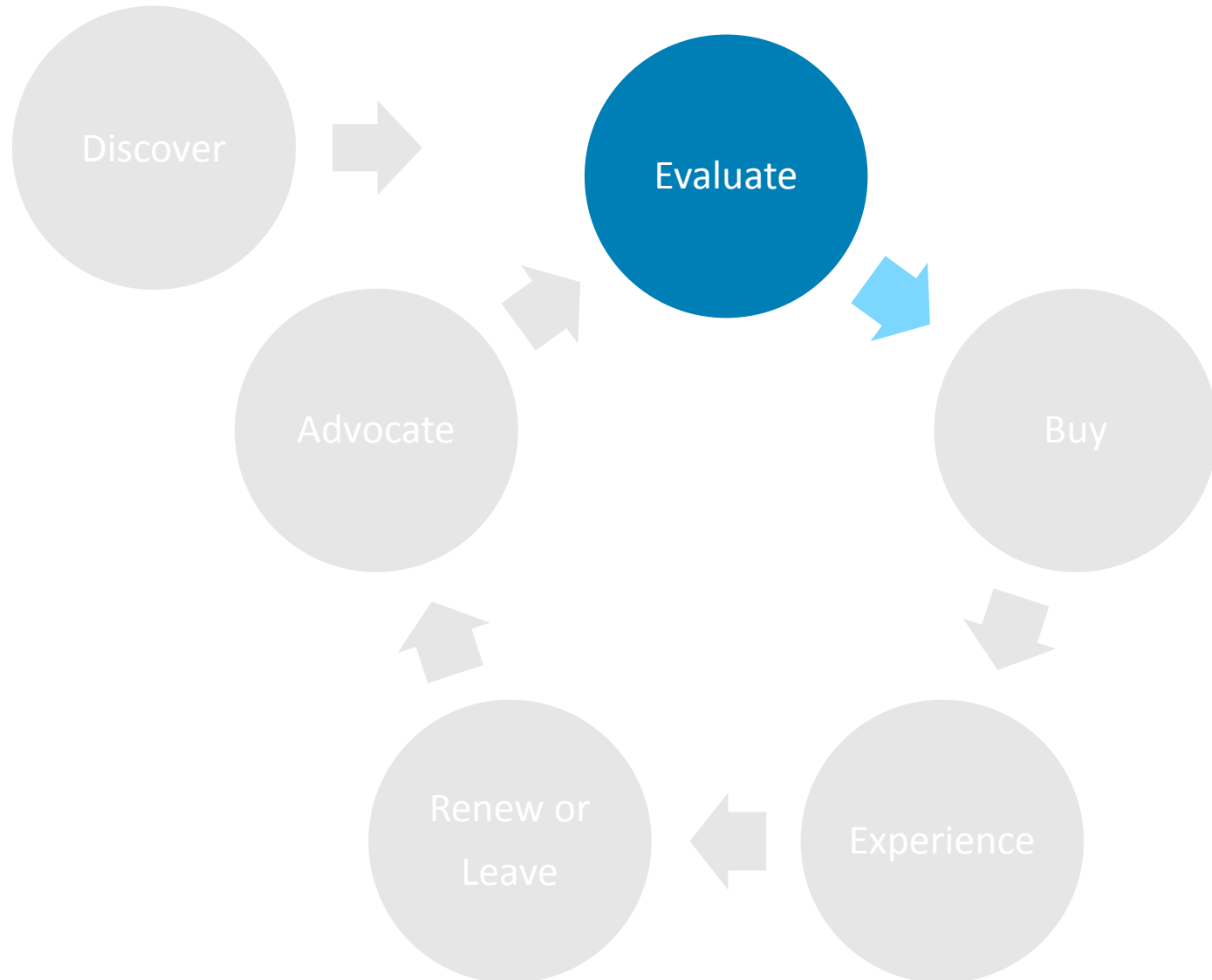




# Solutions







Chat with us here



**AIDEN**

Welcome to Excalibur Insurance. I'm AIDEN - Digital Assistant here to help

hi

AIDEN

Hello!

What can I help you with today?

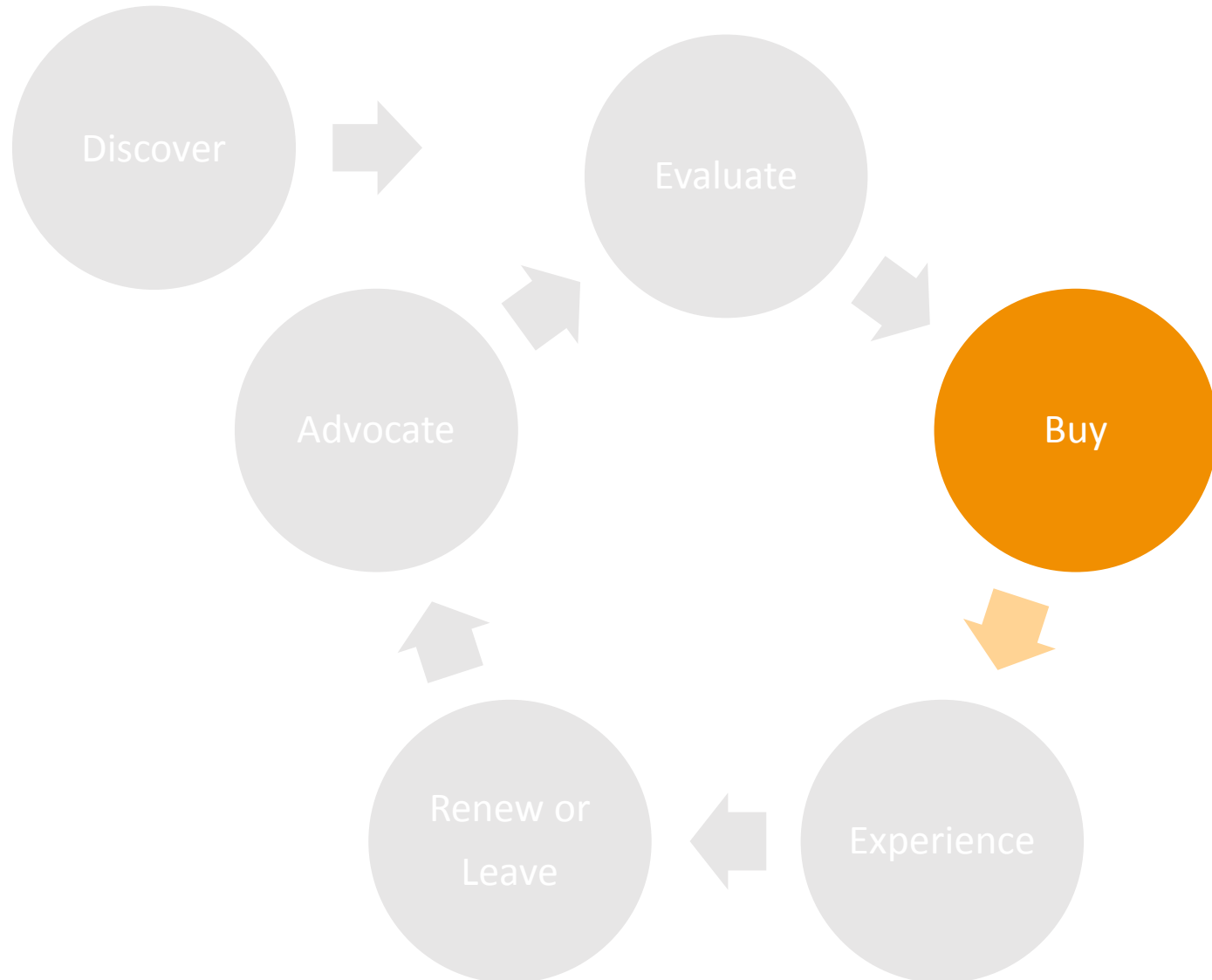
Get a quote

AIDEN

I would be happy to help with a quote.

What are you looking to insure?

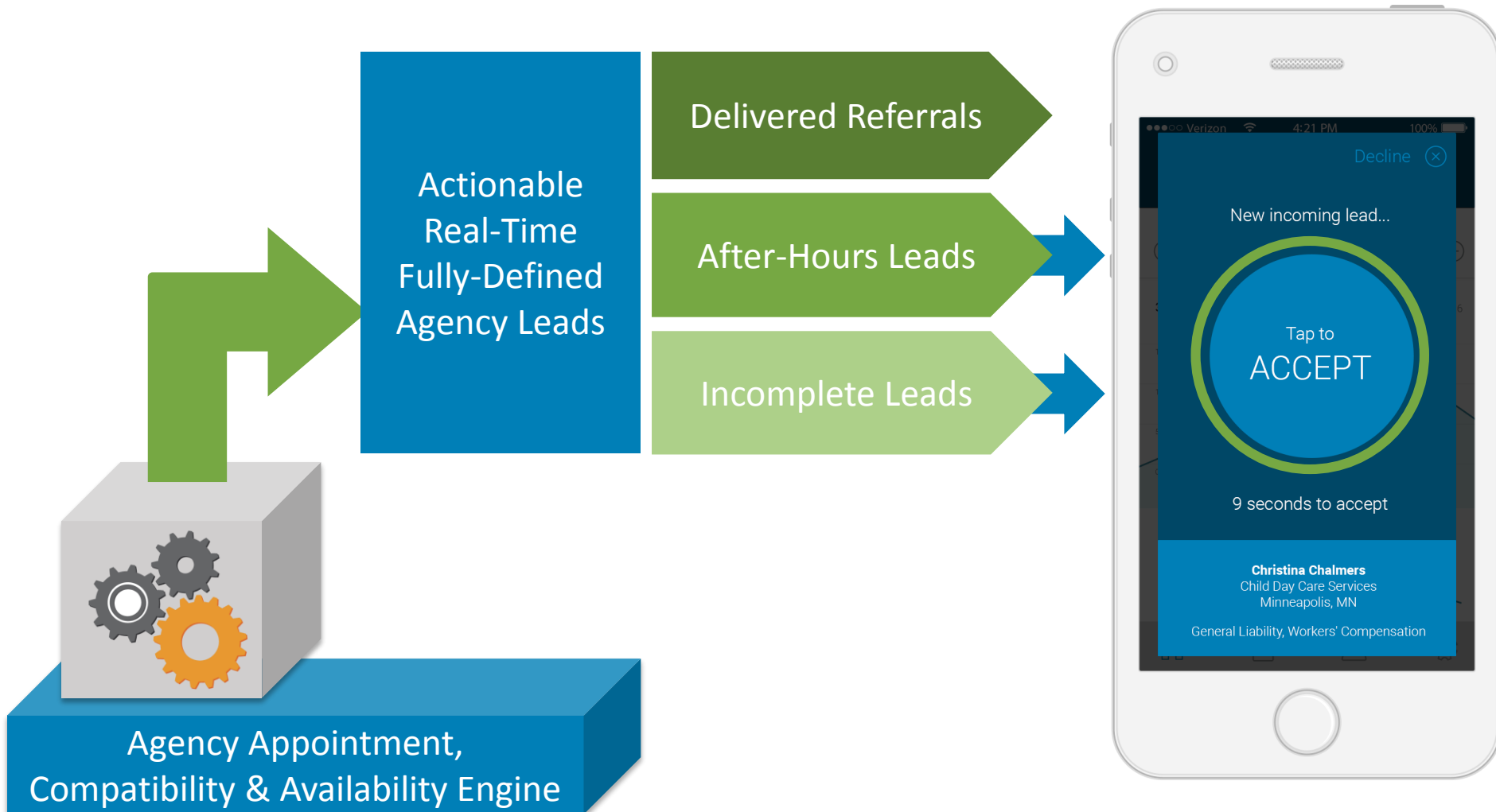
Personal Policy







# We want agents to 'claim' leads in real time



Go Online

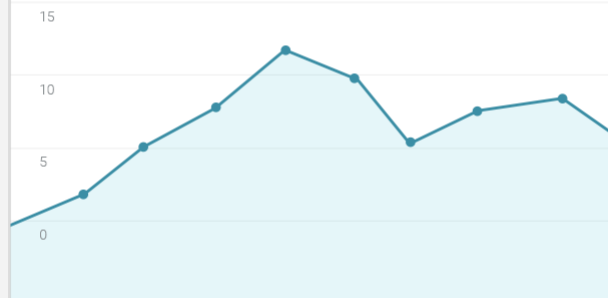


## My Stats



36 Leads

MAR 30 - APR 6



10  
New



21  
In Progress



5  
Closed



10



## Recommended agents for you



● online now

### Sarah Green

Tripoli Insurance

**Specialties:** Child Day Care Services, Bakeries,  
Ambulatory Health

.4 miles away

[view full profile](#)

Contact



○ offline

### Alex Perez

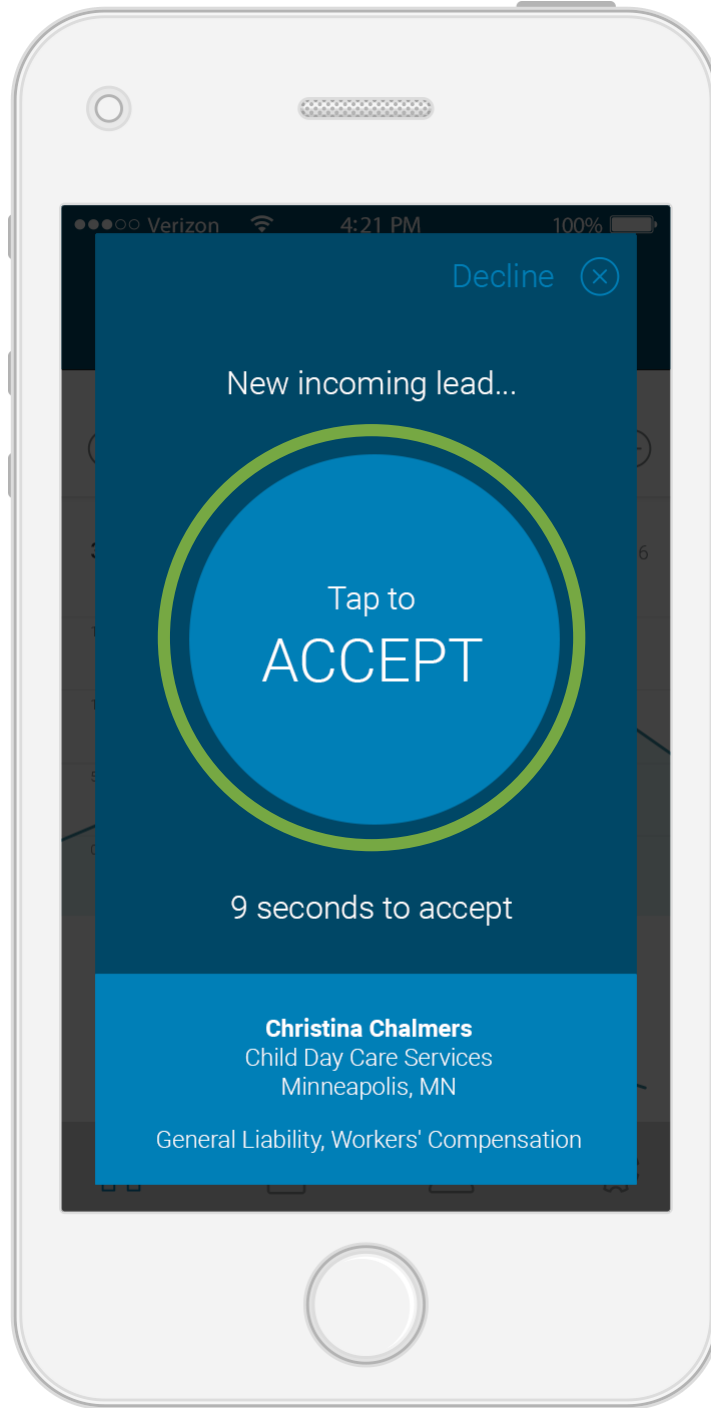
The Perez Agency

**Specialties:** Manufacturing, Child Day Care  
Services, Used Care Dealers

2.3 miles away

[view full profile](#)

Contact



Verizon 4:21 PM 100%

Decline (X)

New incoming lead...

Tap to  
ACCEPT

9 seconds to accept

**Christina Chalmers**

Child Day Care Services  
Minneapolis, MN

General Liability, Workers' Compensation

## Industries Served

Ensure your agency gets referrals only for the industries you serve by turning them on or off. Want to include or exclude specific businesses within an industry? Use the Choose Business Types button to customize your preferences by 6-digit NAICS code.

Accommodation and Food Services	<input checked="" type="checkbox"/>	Information	<input type="checkbox"/>
Administrative and Support and Waste	<input type="checkbox"/>	Management of Companies and Enterprises	<input checked="" type="checkbox"/>
Agriculture, Forestry, Fishing and Hunting	<input checked="" type="checkbox"/>	Mining, Quarrying, and Oil and Gas Extraction	<input checked="" type="checkbox"/>

Arts, Entertainment, and Recreation
Construction
Educational Services
Finance and Insurance
Health Care and Social Assistance

### Choose Business Types

[Save](#)
[Discard Changes](#)

Use the table below to set preferences by business type (6-digit NAICS) for businesses within your selected industries.

Apply to Selected (0 rows) ▼

	NAICS	Industry	Business Type	Appetite
<input type="checkbox"/>	<input type="text"/>	All ▼	<input type="text"/>	Both ▼
<input type="checkbox"/>	112910	Agriculture, Forestry, Fishing and Hunting	Apiculture Synonym, Synonym	<input type="checkbox"/>
<input type="checkbox"/>	112920	Agriculture, Forestry, Fishing and Hunting	Horses and Other Equine Production Synonym, Synonym	<input type="checkbox"/>
<input type="checkbox"/>	112920	Agriculture, Forestry, Fishing and Hunting	Horses and Other Equine Production Synonym, Synonym	<input type="checkbox"/>
<input type="checkbox"/>	112920	Agriculture, Forestry, Fishing and Hunting	Horses and Other Equine Production Synonym, Synonym	<input type="checkbox"/>
<input type="checkbox"/>	112920	Agriculture, Forestry, Fishing and Hunting	Horses and Other Equine Production Synonym, Synonym	<input type="checkbox"/>
<input type="checkbox"/>	112930	Agriculture, Forestry, Fishing and Hunting	Fur-Bearing Animal and Rabbit Production Synonym, Synonym	<input type="checkbox"/>
<input type="checkbox"/>	112990	Agriculture, Forestry, Fishing and Hunting	Animal Production NOC Synonym, Synonym	<input type="checkbox"/>
<input type="checkbox"/>	113110	Agriculture, Forestry, Fishing and Hunting	Timber Tract Operations Synonym, Synonym	<input checked="" type="checkbox"/>
<input type="checkbox"/>	113210	Agriculture, Forestry, Fishing and Hunting	Forest Nurseries and Gathering of Forest Products Synonym, Synonym	<input checked="" type="checkbox"/>
<input type="checkbox"/>	113310	Agriculture, Forestry, Fishing and Hunting	Logging Synonym, Synonym	<input checked="" type="checkbox"/>
<input type="checkbox"/>	113310	Agriculture, Forestry, Fishing and Hunting	Logging	<input checked="" type="checkbox"/>

Want to include or exclude specific businesses within an industry?

# Referral Management

[Find Market](#)

## Profile Activity

Last 30 days (01/18/2017 - 02/16/2017)

55	Appearances in search results
1	Visitors viewed your agency profile
0	Referrals delivered to your agency

0	Phone calls to your agency through TrustedChoice.com
0	Visitors went to your agency website
0	Visitors viewed your agency contact form

## Referrals

[Export to Excel](#)

Date	Phone	Name	Business Name	Email	Category	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	
11/28/2016	(303) 269-1381	Ronda Derbee			Personal	<a href="#">Edit</a> <a href="#">Email</a>
11/15/2016	(720) 340-3353	Dani Frausto	Rocky Mountain Buildings	dfrausto@rockymtnbuildings.com	Commercial	<a href="#">Edit</a> <a href="#">Email</a>
11/08/2016	(720) 212-6654	Mike Irvin			Personal	<a href="#">Edit</a> <a href="#">Email</a>
10/03/2016		Jeff Hargett		1961hargo@gmail.com	Personal	<a href="#">Edit</a> <a href="#">Email</a>
09/21/2016	(303) 652-3501	Sheri Sutton		classiclooks@niwot.comcastbiz.net	Personal	<a href="#">Edit</a> <a href="#">Email</a>
09/18/2016		DT Cai		dtcai04@gmail.com	Personal	<a href="#">Edit</a> <a href="#">Email</a>
09/06/2016		Chelsey McCrory		hayzlipgirl12@gmail.com	Personal	<a href="#">Edit</a> <a href="#">Email</a>

# Agency Nation Elevate Conference

## SPEAKERS

From agents to carrier executives to marketing & sales thought-leaders, at **Elevate 2017** you'll experience an avalanche of world-class expertise.



**Ted Devine**

CEO - INSUREON



**Erin Nutting**

PRINCIPLE - INTEGRITY INSURANCE SERVICES



**Jeff Bair**

HEAD OF IA & AFFINITY MARKETING -  
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Q & A