

ACT Customer Experience Work Group

PL & CL Sub-Group updates

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*Karyn Furstman & Cynthia Lait, PL Chairs
Nick Oldfield, CL Chair*



Objective

To create a roadmap for independent agents and their carriers in order to deliver an outstanding customer experience at each stage of the customer's journey

- Moments of Truth
- Pain Points
- Best Practices

Main Work Group and Sub-group team

Name	Company
Claudia McClain	McClain Insurance Services
Judy DeLaRosa	Chubb Insurance
Nick Oldfield - CL	Cincinnati Financial
Karyn Furstman & Cynthia Lait - PL	Safeco
Jeff Yates, Ron Berg	ACT

Commercial Lines Journey Mapping - Update

✓ Two Personas

David



Pat



- ✓ First draft of Customer Journey Map
 - ✓ Six phases, 65 touchpoints for David, 24 touchpoints (and growing) for Pat
 - ✓ Began using Touchpoint Dashboard software

Personal Lines Journey Mapping - Update

✓ Two Personas

Jan



Kevin



✓ First draft of Customer Journey Map

- ✓ Six phases, 59 touchpoints for Jan, 22 touchpoints for Kevin
- ✓ Began using Touchpoint Dashboard software

What's Next

- Today
 - Confirmation of Customer Journey Map Touchpoints
 - Identifying
 - Moments of Truth
 - Pain points
 - Best practices
- Beyond today
 - Using software to document and share customer journey map
 - Confirming Moments of Truth, Pain Points
 - Documenting best practices