

Case Study: Certification Brings Operational Improvements

Sunshine Insurance, China

“As a result of the certification project, we have implemented a complete KPI system, standardized our operations and improved our management skills. I have found the COPC CX Standard to be a very effective management methodology.”

Head of Sunshine Insurance Contact Center

About The Client

Sunshine Insurance is recognized as one of China's Top 500 companies and is one of the biggest insurance companies in Asia with registered capital of 6.7 RMB billion (approx. USD\$1.1 billion) and overall total assets of more than 90 billion RMB.

Sunshine Insurance is committed to becoming the world's leading insurance and financial group and its vision is to be an insurance company of outstanding quality and capabilities.

Challenge

In the highly competitive insurance industry in China, Sunshine Insurance's strategy is to build customer loyalty and increase sales by providing an excellent customer experience.

Sunshine Insurance has grown rapidly in the last few years. The company wanted to understand if its contact centers were meeting its customer service and sales goals. At the same time, it wanted to develop an objective and sustainable management system to improve its foundations for further growth.

Sunshine Insurance decided to look beyond the local Chinese competitors and benchmark its customer operations against internationally recognized high performance organizations. The company wanted to learn management techniques and best practices to ensure it maintained its position as a leader in the China financial services industry.

Improvements

- Achieved **4X ROI in cost savings in the first year of implementation**
- Client satisfaction increased by 18%
- Occupancy in the Property Insurance Claims contact center improved by nearly 20%
- Cost of managing quality improved by the equivalent of an 8 FTE reduction through better sampling approaches
- First contact resolution (FCR) improved by 13%
- Occupancy in the Enquiries contact center improved by about 15%
- Overtime hours were reduced by more than 50% through improved workforce management practices
- The percentage of new staff recruited on-time improved from only 20% to more than 80%

The COPC Inc. Solution

Baseline Assessment

A team of expert consultants from COPC Inc. spent a week on-site to complete a comprehensive Baseline Assessment of the Sunshine Insurance contact center operations in Beijing.

This in-depth review of the operations and management of the contact center identified gaps and deficiencies in Sunshine Insurance's contact center management practices and outlined the improvements required to become a high performance operation.

At the conclusion of the on-site Baseline Assessment, the COPC Inc. team presented their findings and recommendations. The recommendations were prioritized to provide Sunshine Insurance with clear guidance on which areas to focus their improvement efforts for the maximum return on investment.

"Sunshine Insurance is a great example of a high performance contact center.

Their dedication to performance improvement and operational excellence has been evident throughout the time we have been working with them and the results they have achieved speak for themselves."

**CEO Asia Pacific Region
COPC Inc.**

Structured Support

COPC Inc. then led the improvement efforts through a structured support process, involving teleconferences and on-site consulting support. The Sunshine Insurance management team worked with COPC Inc. to complete the following activities:

- **Customer satisfaction key driver analysis:** COPC Inc. worked with Sunshine Insurance to analyze thousands of customer feedback items to understand which operational areas had the biggest impact on overall customer satisfaction.
- **Quality program redesign:** COPC Inc. redesigned the quality program to align it with the key drivers of customer satisfaction, as well as the requirements of the business (such as compliance and sales). COPC Inc. also introduced statistical sampling strategies which enabled Sunshine Insurance to reduce the required number of dedicated quality resources.
- **Key Performance Indicator (KPI) development and alignment:** Using the required metrics from the COPC CX Standard, Sunshine Insurance was able to develop a balanced approach to managing service, quality and cost across all operational activities. The KPIs were aligned with high performance organizations, and COPC Inc. tested the measurement of these KPIs to ensure that they had integrity and were usable. With a comprehensive dashboard of operational metrics, Sunshine Insurance was now positioned to take action when performance was not meeting targets.
- **Performance management training:** All senior contact center executives attended training to the COPC CX Standard and achieved individual certification. In addition, contact center managers and supervisors attended a customized COPC High Performance Management Techniques Training.
- **Forecasting, Staffing, Scheduling:** COPC Inc. provided consulting support and coaching to help the workforce management team improve forecasting accuracy and create appropriate schedules for the forecast, resulting in improved occupancy in the contact center.

The COPC Inc. Solution

Certification

After twelve months of diligent and determined work by the Sunshine Insurance management team, supported by COPC Inc.'s consultants, the contact center believed it was sufficiently prepared for the certification audit. The auditors from COPC Inc. returned to the Beijing contact center to assess Sunshine Insurance's performance and to determine whether the contact center had developed and implemented management approaches according to the requirements of the COPC CX Standard.

Once again, the COPC Inc. audit team spent one week on-site reviewing data, listening to calls, observing coaching sessions, analyzing performance data and interviewing agents, managers and team leaders. In addition, the auditors met with support teams such as quality, workforce planning, recruitment and human resources.

COPC Inc. was delighted to find that the requirements of the COPC CX Standard had been implemented broadly throughout the contact center, and that performance had improved dramatically within the twelve-month period.



Figure 1

- COPC Inc. identified the issues which were preventing Sunshine Insurance from onboarding new staff in a timely manner. Once these were removed, the recruiting process improved dramatically.
- On Time Recruiting increased from less than 20% in February to over 80% between August and November.

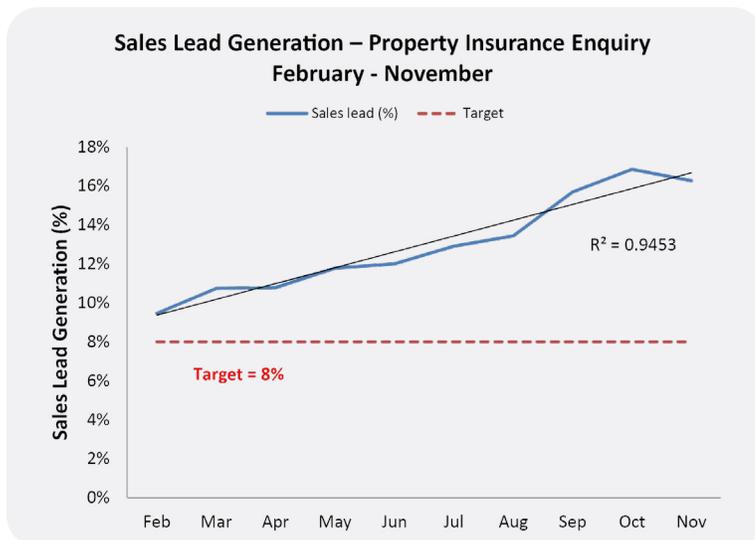


Figure 2

- By developing frontline sales techniques, COPC Inc. helped Sunshine Insurance improve lead generation in the Property Insurance Enquiry contact center.
- Sales Lead Generation increased from 10% to 16%.

The COPC Inc. Solution

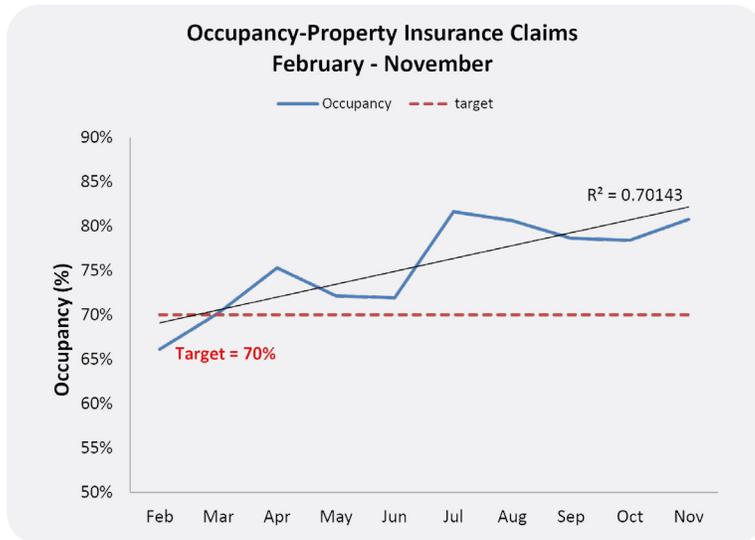


Figure 3

The Sunshine Insurance contact center was suffering from low occupancy, with long periods of unproductive time for the frontline staff.

- COPC Inc. provided recommendations for changes in staffing practices which improved Occupancy in the Property Insurance Claims contact center from 65% to 80%.

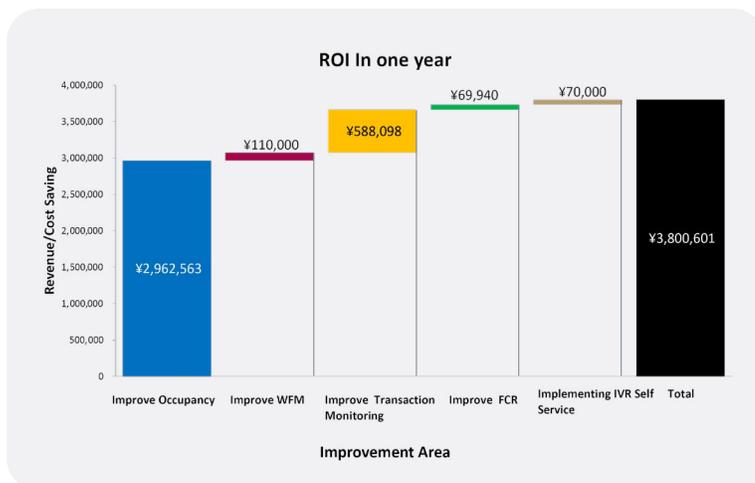


Figure 4

Sunshine Insurance achieved **4x ROI** within the first twelve months of working with COPC Inc.

- The financial improvements were generated via increased occupancy (minimizing overstaffing), better scheduling practices, reduced repeat contacts and the redirection of simple enquiry calls to an automated IVR facility.

Benefits

Sunshine Insurance initially engaged COPC Inc. to provide an in-depth analysis of its contact center operations and to benchmark it compared to global high-performance organizations. During the Baseline Assessment phase of the project, COPC Inc.'s consultants were able to identify significant operational improvement opportunities in areas such as reducing repeat contacts, improving scheduling effectiveness, improving cost management and sales conversion rate.

Within twelve months of working with COPC Inc., Sunshine Insurance achieved a significant return on its initial investment and is now the first financial services company in China to achieve certification to the COPC CX Standard.

Sunshine Insurance has truly demonstrated that it is a leader in contact center operations in China.

About COPC Inc.

COPC Inc. provides consulting, training, certification, benchmarking and research for operations supporting the customer experience. The company created the COPC Standards, a collection of performance management systems for customer experience operations, customer experience management, vendor management and procurement.

Founded in 1996, COPC Inc. began by helping call centers improve their performance. Today, the company is an innovative global leader that empowers organizations to optimize operations to deliver a superior service journey. COPC Inc. headquarters are in Winter Park, FL, U.S. with operations in Europe, the Middle East, Africa, Asia Pacific, Latin America, India and Japan. www.copc.com

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