Premier Diversified Insurance and Financial Services Giant Ensures More Web Sales with Cobrowse, Chat, and Click to Call

COMPANY
This membership-based organization was founded over eighty years ago. It now employs more than twenty thousand people, manages over $150 billion in assets, and provides home, life, and auto insurance, banking, and financial planning services to over eight million members worldwide.

CHALLENGE
When the company moved more business online, abandonment rates for online transactions were very high. Members were getting confused by a busy website and complex, multi-step application processes, and abandoning forms midway. Known in the industry for stellar customer service, the company realized that phone and online chat assistance were not enough. In order to maintain their service-first reputation, the company needed to do a better job of assisting members in completing online transactions.

SOLUTION
The company decided to offer cobrowsing along with phone or chat interactions. It chose to deploy eGain Cobrowse™, eGain Chat™, and eGain ClicktoCall™. The eGain solution was integrated with the company’s Cisco® Unified Contact Center Enterprise phone system, Documentum, and other systems in the contact center. Agents immediately started to use cobrowse to assist customers, moving them seamlessly to “show and tell” mode with realtime guidance, informative site tours, shared pointers, and joint form-filling to complete transactions. Flexible cobrowse rules protected sensitive customer data, building confidence in the online experience. eGain ClicktoCall made it even easier to integrate, track, and report on combined phone and online experiences, and because it allows both “Call Me Now” and scheduled callbacks, lessened the burden on agents during peak hours.

RESULTS
Both eGain Cobrowse and eGain ClicktoCall have been “overwhelming successes in improving online sales completion,” says their Director of Customer Service, who initially deployed the solution to the Banking, New Member, and Financial Advisor groups within the organization. They experienced a spike in new member onboarding with online form completion numbers increasing by a whopping 200%—from 25% to 75%.

They have 7,000 agents using this interactive sales capability on over 700 pages on their website. “It increases self-service awareness, improves customer satisfaction, and members become more comfortable with doing a greater portion of their business online,” explained the director, adding, “We’ve gotten great feedback on customer satisfaction.” Talk about lightening the load for those who serve!