



Windows Server 2003 Customer Solution Case Study



Customer: Norwich Union
Web Site: www.norwichunion.com
Number of Employees: 59,000
Country or Region: United Kingdom
Industry: Financial services
Partner: mplSystems

Customer Profile

Norwich Union, based in the United Kingdom, is a leading provider of life insurance and long-term savings, with a market share of about 12 per cent. It's also part of Aviva, the world's fifth-largest insurance group.

Software and Services

- Microsoft Server Product Portfolio
 - Microsoft SQL Server 2005
 - Windows Server 2003 Enterprise Edition
- Technologies
 - Microsoft ASP.NET
 - Microsoft .NET services

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Norwich Union Increases Life Insurance Sales with Contact Management Solution

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Andy Wharton, Business Services Project Manager, Norwich Union

Norwich Union introduced a tele-underwriting team to increase sales of life insurance. The company then looked for a customer contact management system to maximise the productivity of workgroup members. Built on Microsoft® technology, intelligentContact (iContact) from mplSystems gave Norwich Union a system that was easy to integrate and scale. Thanks to the iContact system, the tele-underwriting team has increased sales and reduced errors.

Business Needs

Norwich Union is a leading provider of life insurance services in the United Kingdom (U.K.). It also insures one in five households, one in seven motor vehicles, and more than 800,000 businesses in the country. The company is part of Aviva, the biggest insurance group in the U.K. and a leading provider of life insurance and pensions products worldwide.

Effective underwriting is at the heart of a successful life insurer. A typical joint policy form can take more than an hour to complete due to the amount of personal information that's needed. As a result, there

is a high risk of errors occurring—causing companies to lose time and money re-interviewing customers to ensure application forms are completed correctly.

Norwich Union looked at how to reduce errors and make completing applications fast and painless. It decided to set up a tele-underwriting team, where well-trained personnel interviewed prospective customers and completed forms accurately and quickly over the phone.

To complement the training, Norwich Union began looking for a customer contact management solution on which to develop a



range of automated services, starting with appointment planning. Andy Wharton, Business Services Project Manager at Norwich Union, says: "There was real potential for growth around life insurance. Here was a group of tele-underwriters with high expectations, who needed as much support as possible."

Solution

Norwich Union started a comprehensive review of contact management technology, including existing solutions across the U.K. Aviva organisation. Due to the unique nature of this work, only intelligentContact (iContact) from Microsoft Gold Certified Partner mplSystems met all the business requirements and integrated easily with the existing Norwich Union IT infrastructure. Wharton says: "The majority of Norwich Union and Aviva servers run in Windows Server environments, so the iContact solution from mplSystems was a perfect fit with our current IT roadmap."

iContact is built on a core Microsoft software, including:

- Windows Server® 2003 operating system
- Microsoft SQL Server® 2005 data management software
- Microsoft ASP.NET 2.0
- Microsoft .NET services

The solution delivers a cost-effective, one-stop shop for customer handling. It offers all the ingredients of traditional contact centre technology including IVR, scripting, messaging, workflow, scheduling, and reporting. In the case of Norwich Union, iContact was delivered custom-made. The plan was to develop on the solution's functionality over time.

By July 2007, the first phase of deployment—automating the management of phone appointments—was complete. The clever part of the system is that it understands how long each insurance form takes to complete and allocates time accordingly. The number of phone appointments then synchronises perfectly with a tele-underwriter's availability. Tele-underwriters use iAnalyse—the business intelligence module within iContact—to report on all call activity. Among other services, it stores contact records and recordings, escalates messages, and auto-delivers reports.

Benefits

By using the Microsoft-based iContact system, the tele-underwriting team has increased the number of successfully completed forms. And, according to Wharton, there are now fewer errors. By automating the whole process for planning appointments, tele-underwriters are highly productive.

- The system knows how much time to allocate each phone interview so that tele-underwriters can complete all relevant fields in the form and avoid errors.
- Prospective clients gain the same excellent level of service as customers for other areas of the Norwich Union business.
- Norwich Union has implemented an infrastructure on which to roll out additional services in the future cost-effectively.
- The infrastructure can be integrated with other areas of the business easily to deliver more value in the years ahead.
- Thanks to Microsoft software's great interoperability, Norwich Union will integrate iContact with its own systems rapidly.