



SYNDICATE AUTOMATES POLICYHOLDER SURVEYS AND GAINS A COMPETITIVE ADVANTAGE



The Challenge

As policyholders experience natural disasters and other incidents resulting in property damage, Syndicate's team of claims adjusters provides onsite representation for insurance carriers. The customer experience (CX) in these sensitive situations can ultimately make or break a policyholder's trust and loyalty with their insurance company. As a result, the need to deliver consistent exemplary service is critical.

Like other claims adjustment firms, Syndicate's services traditionally have been viewed as a commodity by insurance carriers; however, Syndicate President and CEO Josh Morgan believed he could differentiate his company based on the high levels of customer satisfaction provided. To gather the quantifiable customer experience data that was needed, a telephone survey was developed in-house.

At A Glance

▶ CLIENT

Syndicate Claims Services, Inc., one of the nation's fastest-growing independent insurance adjusting firms.

▶ CHALLENGE

Improve policyholder survey efficiency and create business differentiation based on customer satisfaction.

▶ APPROACH

Leverage SocialSurvey's Survey and Reviews applications.

▶ RESULTS

Syndicate now receives more detailed customer experience feedback faster, providing deeper insight and differentiation in a competitive marketplace.



Any customer satisfaction data gathered from the surveys would then be reviewed by management and shared quarterly to better engage and motivate Syndicate's team of claims adjusters.

Unfortunately, conducting the surveys turned out to be a tedious and time-consuming process, resulting in a large percentage of unanswered and unreturned calls to policyholders. In order to use customer survey results as a competitive marketing advantage, Syndicate needed a more efficient way to engage with policyholders and elicit a higher survey response rate. A solution was found with SocialSurvey.

The Approach

Syndicate has now implemented SocialSurvey's experience management platform, utilizing its automated survey component to streamline and accelerate the customer feedback process. File data is funneled from Syndicate's claims management system (FileTrac) to the SocialSurvey

platform through an application programming interface. Immediately following an inspection and data being entered into the system by the Syndicate adjuster, an automated survey is sent to the policyholder to rate the recent claims experience.

The Results

"With the automated surveys on SocialSurvey, we are getting more customer feedback and better information faster," Morgan says. "What used to take several weeks has been shortened to a few days or even hours, and we can quickly share the data with our client partners, our adjusters, and all of our management and administrative teams.

"As a company, we can see how we're doing for CX, and our adjusters now have a complete view of how the day went as opposed to only bits and pieces of the last quarter," continues Morgan. Consequently, management has gained greater insight into the company's strengths as well as areas in which they can make improvements for better business outcomes.

“We get positive feedback quite often,” Morgan says. “For example, we found that many policyholders do not fully understand the claims process, but they were impressed with how smoothly it went and how well the claim was explained by our adjusters as it progressed along. On the other hand, sometimes claims aren’t covered and that doesn’t sit well with the policyholders. So, we know that a strength of our adjusters is the ability to communicate realistic expectations to policyholders, which makes for a better customer experience.”

“With SocialSurvey, Syndicate has customer experience metrics to show that we are different and have more to offer. That’s a game changer in our industry and a huge competitive advantage for us.”

**- JOSH MORGAN,
PRESIDENT AND CEO**

The immediacy of customer feedback through the SocialSurvey platform continues to give Syndicate a competitive edge in a commoditized marketplace. “Every company in our space relies on cycle time of claims processing to win business,” Morgan says. “But with SocialSurvey, Syndicate now has customer experience metrics to add to our already excellent cycle times. The policyholder’s satisfaction with Syndicate also reflects back to the insurance company. We can say to our current and potential clients, ‘We have the best claims adjusters in the business, and we have the

data to prove it’. That’s a game changer in our industry and a huge competitive advantage for us.”

The faster availability of survey responses also provides additional motivation for the company’s claims adjusters to maintain and consistently provide service excellence. “From a marketing standpoint, I’m really excited about the engagement piece,” says Marketing Specialist, Cara Gilliam. “I think the insurance industry has been moving on a slow path when it comes to technology, and I think that adopting SocialSurvey was a really important move for us.”

Morgan notes that claims adjusters can see a variety of devastating situations in a given day, and through the CX insight gained with the SocialSurvey platform, adjuster morale can be boosted. “It used to be difficult for our adjusters to know if they were actually doing a good job,” Morgan says. “Now, they can get rapid feedback and feel good knowing the policyholder really appreciated what they did that day.

“Our adjusters deal with people all day long who are confused and anxious, and they continually go out there to help rebuild lives after a disaster. That’s the beauty of our business, and the customer experience data we get from SocialSurvey helps us do it even better.”



About SocialSurvey

SocialSurvey is a rapidly-growing provider of Experience Management software. Using its integrated, cloud-based platform and customizable processes, any business can manage customer and employee experiences across their products, locations and brand(s). By driving behavioral change, SocialSurvey delivers impactful business outcomes including increased customer satisfaction, brand loyalty, online reputation and visibility, as well as improved employee engagement, and compliance. Founded in 2015, SocialSurvey is headquartered in San Ramon, Calif. and backed by Kennet Partners LLC., Silicon Valley Data Capital, Tri-Valley Ventures, and Wilson Sonsini Goodrich & Rosati.

For more information, visit www.socialsurvey.com or call +1 (888) 701 4512.