

Cresta for Health Insurance

Insurance providers safeguard policyholders against the unknown – a trip to the ER, an illness, an unexpected X-ray. Cresta offers providers some insurance of their own, leveraging real-time intelligence to take “unknown” out of the equation and predictably build better customer experience (CX), greater agent productivity, and higher profit with every conversation.

Real-Time Intelligence: Coverage for Every Conversation

Deepen policyholder trust and loyalty with each interaction. Reduce compliance infractions and costly productivity loss. Uncover valuable right-sizing opportunities. Scale efficiency and best practices to new and seasonal representatives. Do it all in real time.



Make every touchpoint memorable

Improve CSAT and NPS with shorter wait times, easier access to information, and streamlined communication between reps and leaders.



Reduce non-compliance penalties, boost agent efficiency

Keep reps on track with hints and alerts for fewer compliance infractions; increase efficiency with guided workflows, automatic summarization and more.



Drive value & retention with personalized experiences

Track trending topics to uncover compelling opportunities; prompt reps to suggest relevant products or policies by deploying updates in real time.



Reduce new employee ramp time, staff dynamically

Whether they're staying for a seasonal spike or for good, ramp up new reps faster with coaching, live assistance, and clear progress visibility.

Enhance Value and Increase Profit while Managing Costs

Selecting health insurance is a deeply personal process – there is no one-size-fits-all package. Creating a personalized policy mix benefits both providers and policyholders, but representatives often lack the tools, information, and time to do this effectively. Cresta enables value-add suggestions without compromising on efficiency thanks to features like:

- Real-time hints and guided responses that help reps arrive at a tailored offering faster
- Automatic summarization, note taking, smart compose and more to drive profit-boosting efficiency
- Personalized coaching to ensure no opportunity is lost due to preventable behavioral blunders
- Topic discovery for greater visibility into the trends motivating policyholders

Make Every Interaction Meaningful – and Error Free

Insurers have precious opportunities to engage directly with policyholders. When it comes time for a purchase, claim, or renewal, there's no margin for error – the experience needs to be seamless, satisfying, and free of compliance infractions. To make every conversation a brand-building interaction, Cresta offers support through:

- Knowledge assist and live assist to give reps faster access to information and receive live approvals from supervisors
- Hints, alerts and notifications that drive compliance in real time to minimize risk
- Real-time coaching to reinforce positive behaviors and best practices
- AI-powered checklists and guided workflows that help reps solve even the most complex interactions

Turn Seasonal Representatives into Seasoned Pros

The seasonal nature of health insurance contact centers poses a threat to delivering dependable, high quality CX – as does the difficulty many insurers face in attracting and retaining talent long term. New representatives often lack the skill and confidence of their veteran counterparts; even experienced employees need updated training as policy offerings evolve. Cresta helps new and experienced team members with features like:

- Real-time coaching, hints, and live assist to help new reps feel supported as they ramp up
- Knowledge assist and guided workflows that supply relevant information and imbue confidence
- QA scorecards and agent progression insights for enhanced performance visibility with no wait



Cresta's Real-Time Intelligence gives insurers the power to stand out

As the central hub of intelligence, Cresta improves with every conversation

Cresta Insights

- ✓ Uncover trends in policyholders' conversations; easily take action
- ✓ Evaluate 100% of customer conversations to stay ahead of trends and uncover profitable opportunities

Cresta Chatbots

- ✓ Self-Service Automation
- ✓ Identify the right use cases to automate around the clock

Cresta Agent Assist

- ✓ Efficiency Tools
- ✓ Free agent's minds and hands with automatic note taking and summarization

Cresta Effectiveness

- ✓ Real-time coaching, hints and checklists to remain compliant and improve CX

Cresta Director

- ✓ Enhance coaching workflows and compliance evaluation with automated QA, coaching plans, a real-time view of performance

Insurance providers give policyholders confidence that the things they hold dear – their health and the health of their families – are protected. But with so few touchpoints, one bad interaction can ruin the relationship. Build trust and deepen loyalty with every conversation. Boost value while boosting profits. Maintain a clear view of performance, compliance, and quality. Empower greater efficiency to manage costs.

Make policyholders happier and maximize value with Cresta's Real-Time Intelligence.

Cresta's Comprehensive Real-Time Intelligence Solution



60%

increase in conversions

2 week

reduction in ramp time

20%

increase in CSAT

5 hours

saved on repetitive work per week

5x

increase in adherence