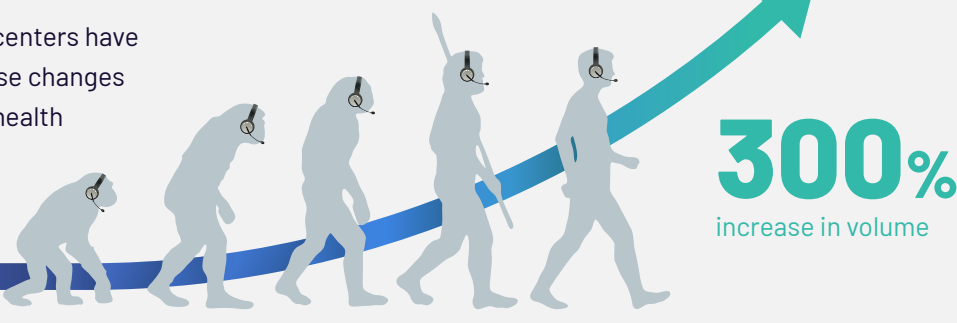


# Maximizing Sales & Customer Value with AI in Health Insurance

## 4 Strategies to Drive Sales & Customer Value

### The Contact Center Has Evolved

In the years since COVID-19, contact centers have seen a 300% increase in volume. These changes have been felt particularly acutely in health insurance contact centers.



Interactions between agents and policyholders are **emotionally charged** - these are big life decisions



Opportunities to connect with policyholders and provide **winning customer experiences are limited**: Claims, Renewals



Macro trends are changing **contact center operations** and keeping pace with these changes has never been more important

### Four trends shaping the industry

Forrester Research indicates that **empowering agents to solve problems** themselves could generate millions in incremental revenue\*

External forces are impacting the way that health insurance contact centers operate - and deliver value to policyholders and the business

**42%** of policyholders say they don't fully trust their insurer

Contact center as a high-velocity revenue generator



Lack of customer trust

Investment in infrastructure and technology



Surging need for staffing

**60%**

of customers are in favor of applying AI to customer service

**55%**

of companies say that Average Handle Time has increased

### Strategies to address the unexpected

Enhance value and drive profit through proven playbooks



- Help agents ramp faster and more efficiently
- Leverage playbooks in real time
- Reinforce positive behaviors to ensure best practices

Monitor quality and compliance



Help agents meet the demand with:

- Real-time hints and step-by-step guidance
- Compliance notifications
- Progress monitoring
- Customized and automated QA scorecards
- Live digital manager assistance and coaching

The future of contact center success is inextricably linked to adoption of AI technology. Here are four strategies proven to deliver the value and efficiency that health insurance contact centers need.



Enable real-time intelligence

- Decrease in ramp time
- Increase in conversions
- Increase in CSAT
- Increase in agent adherence



Build trust and loyalty through personalization

Empower reps with support from:

- Knowledge assist to help right-size policies with up-to-date, localized information
- Real-time answers and approvals from supervisors
- Real-time hints and checklists designed to uncover each policyholder's unique needs
- In the moment behavioral coaching to detect and overcome critical sentiments like frustration

### The solution

By empowering the contact center with modern AI solutions, health insurance providers can deliver personalization and value to all parts of the business. Cresta's real-time intelligence enables providers to thrive by holistically supporting:



#### Agents

Cresta's AI-driven real-time coaching helps agents provide a more **personalized omni-channel experience** and stay on top of customers' needs and account details. On top of that, productivity tools like automatic note taking help agents keep up and quickly **handle high volume**, particularly during seasonal spikes.



#### Managers

Effectively **manage hybrid teams** with 100% visibility into all conversations with AI-driven performance insights. Streamline **employee training and development and decrease attrition** with robust tools such as coaching plans, live assist, and much more.



#### Business

Surface **insights into customer trends**, quickly determine the best course of action, and instantly push changes to make smarter business decisions. Easily adapt to **seasonal demand**—Cresta Virtual Agent deflects thousands of requests, freeing up agents to focus on the most important conversations.

### Proven results from Cresta customers

↓ **2 week**

reduction in ramp time

↑ **60%**

increase in conversions

↑ **20%**

increase in CSAT

↑ **5x**

increase in adherence to proven playbooks

[READ MORE](#)

about how Cresta helps health insurance providers drive value with real-time AI



**CRESTA**