

Policy Fulfillment & Mail Tracking With a Custom Portal

A CASE STUDY - POWERED BY MTI-CONNECT

BACKGROUND:

National General, an insurance company headquartered in New York, is one of the top 50 leaders in providing medical, dental, vision, and home insurance to consumers. The policy and membership divisions were seeking a print and data partner with insurance expertise in digital variable printing, kit fulfillment, and deployment. With the need to welcome new policy holders, the onboarding process rapidly became intricate at a national level with multiple, customized variables needing to arrive to homeowners in a timely and accurate fashion.

CHALLENGES:

Q: What capabilities exist to ensure policies are delivered daily and arrive in home on specific dates?

A: The client's systems were designed to output standard assets and documentation, yet those items were not conducive for bulk mailing. A majority of the client software and CRM databases had constraints in delivering efficiently or were simple designed improperly. The team at MTI had the capability to ingest large volumes of data, transform it, and append the correct assets and barcodes to help National General receive significant postal discounts.

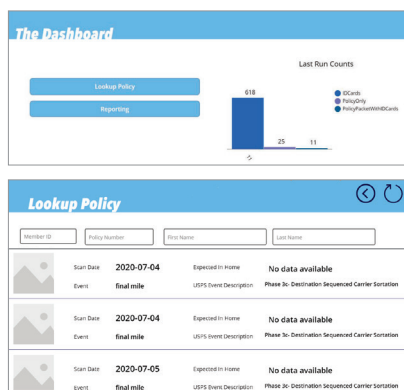
Q: What is the process and commitment for handling returned mail (e.g. undeliverable mail)?

A: MTI created QR codes for each policy mailing, which allowed data and information to be easily scanned and updated on a daily basis. This information was used by a customer service representative to support follow-up calls, and more to mitigate customer issues and servicing matters.



Q: What solutions to be implemented to give customer service representatives the proper insight into the status of a policy (e.g. mailing status)?

A: MTI created a custom portal for the customer service team to enter policy details (e.g. customer name, policy number, etc.). Our custom portal offered full visibility of where the policy was in the tracking process (e.g. mailing status, delivery date, address verification, policy holder change requests, and customized reports). All this supported the team operationally, and helped to mitigate reorders of policy documentation, which resulted in a 20% savings.



RESULTS:



REPORTING:

Designed a CRM Portal, named Corby, which granted visibility into all documentation items, schedules, fulfillment, and creative assets



SAVINGS:

Utilized mail tracking, which saved the client 20% re-fulfillment of policy requests associated with policy printing, delivery, and shipping



CUSTOMIZATION:

Given the challenges of creating this program entirely from scratch, all components were purely variable and highly customized down to the policy holder. 2 cohesive packages with welcome letters, insurance cards, policy details



SCALABILITY:

The success of the program became extremely scalable with the ability to onboard new policy holders seamlessly given the automated processes



METRICS:

500 to 2,000 policies delivered each day. 312,000 policies delivered annually