

# COMPOSITE INSURANCE COMPANY TRIPLED ITS SALES AND OPTIMISED LEAD ALLOCATION WITH KEWOPTIMISE

## About the Company

A local insurance company in Singapore that provides Life, Health and General insurances with gross premium of average S\$6 Billion per year, more than 1 million of customers and approximately 2,000 employees successfully increased its sales conversion with higher appointment rates by optimising its lead allocation with KewMann.

They have several customer channels which include financial advisers, branches, and call centres and they were exploring methods to better utilise the data and modernise traditional systems to achieve greater results and optimise revenue.



### 1. Random lead assignment without additional insights about customers

- Lead allocation is not well structured and does not provide insights about customers potential needs or interest and who is the most suitable advisers (or salespersons) to assign based on their strength

### 2. Limited data utilisation with no insights gained from available data

- Data resided in silos within the insurer's internal systems with no data dictionary

### 3. Low visibility and lack of on-time insights about advisers' activities

- Limited information about the advisers and customers which lead to inefficient lead prospecting and lack of accurate insights to plan for next move.

## Impact & Result



**3x more sales**  
compared to baseline



**Increase 30%**  
appointment rates  
reported in the system

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## The Product : KewOptimise

### Gain a Deeper Understanding about The Target Audiences by Leveraging on Alternative Data

Using alternative data like publicly available data from website and mashup with the internal data from systems or applications to form deeper insights about the advisers and customers behaviour.

### Increase Quality of Engagements with Customers by Generating Talking Points and Guided Selling

Generates effective talking points and provides unprecedented understanding about the prospects or customers that allow the advisers to quickly build rapport and interest with the customers which could increase the chance to have appointments and closure. It also provides the contextual data-driven engagement which includes Nudge, Recommendation and Reward to drive motivations and actions in order to achieve desired outcomes.

### Enhance Lead Allocation with Predictive Modelling and Micro-Segmentation

Allocates leads intelligently based on the highly accurate predictive outcome about the customer behaviours and the adviser's strengths by performing predictive modelling and micro-segmentation. It matches each of the respective leads to the most suitable advisers to optimise the leads allocation with higher appointments and closing rate.

### Optimise Sales with Gamification

Allows the organisation to integrate with their KPIs and systems to gamify the entire work process or sales process by using fun game elements with flexible and configurable gamification mechanics. This could enhance user experience & satisfaction while driving behaviours & actions of target audiences to optimise sales.



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