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PPS Leverages the use of Customer Experience Automation

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Today, customers hold the customer experience in the palm of their hands. They want quick and easy interfaces accessible from their smartphones to interact with companies. The insurance industry is no stranger to the need for clients to have easy, intuitive platforms to connect with them.

In 2021, the Professional Provident Society Insurance Company (PPS), a financial services company that provides a comprehensive suite of financial and healthcare solutions exclusively to graduate professionals, automated customer experience with great results. Choosing Ushur's low-code Customer Experience Automation™ (CXA) platform, PPS is now able to connect with its members in a new and innovative manner, while reshaping its approach to customer engagement.

What makes PPS's implementation of the Ushur CXA platform unique is that it was done in the aftermath of a cyberattack that impacted some of the companies' systems.

When PPS's call center overloaded, Ushur was implemented as a solution for corresponding with members and taking the friction out of customer engagement. As a low-code platform, using Ushur meant that members could be

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communicated with quickly and efficiently without PPS building a custom app. The PPS client services team worked with Ushur to deploy a minimum viable product that automatically dispatched market value statements. Meanwhile, the back-office operations team used Ushur's Invisible App™ – an omnichannel, two-way conversational interface – to send important reminders to customers.

By moving customer conversations to AI-powered digital messaging channels, investors were empowered to self-service urgent requests and rapidly resolve issues. Most importantly, the PPS client services team alleviated pressure on the contact center and freed agents to focus on critical, high-touch issues.

OUT OF A CRISIS BLOSSOMS A SUSTAINABLE CUSTOMER ENGAGEMETN SOLUTION

The implementation of the Invisible App following the cyberattack offered PPS the opportunity to explore other ways for Ushur to empower members to complete tasks quickly and seamlessly.

Charlton Kiewitt, Sector CIO at PPS, said: "We decided to continue using Ushur because it helped build on the existing knowledge and internal processes."

Portfolio amendments were a perfect example of the one-sided, synchronous conversations PPS wanted to automate and the starting point of the extended use of Ushur by the insurer.

"Before, if an investor wanted to make changes to their portfolio, they would have to submit instructions telling us where they wanted to invest, top-up or withdraw. But inevitably, we would need additional information before processing their request, which required several email-based conversations," explained Kiewitt.

When users grant the Invisible App access to their smartphone camera, they can take a quick photo of supporting documents and complete their request. This means we no longer must involve our e-mail triage team because the app communicates with investors automatically."

-Charlton Kiewitt, Sector CIO at PPS

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PPS Investments decided to migrate this workflow to the Invisible App, which allows investors to submit portfolio requests through a PPS-branded app-like interface and are prompted to take a picture of any missing documents with their smartphone. If users abandon the process before completing their request, they receive follow-up reminders via e-mail and SMS.

"When users grant the Invisible App access to their smartphone camera, they can take a quick photo of supporting documents and complete their request. This means we no longer must involve our e-mail triage team because the app communicates with investors automatically," shares Kiewitt.

UPSKILLING BUSINESS USERS TO CITIZEN DEVELOPERS

PPS deployed Ushur in its Investments subsidiary as well as the retention and policy and claims departments within the Life Solutions space.

Due to its drag and drop user interface, business users with no technical background were designing automated workflows within two to four weeks.
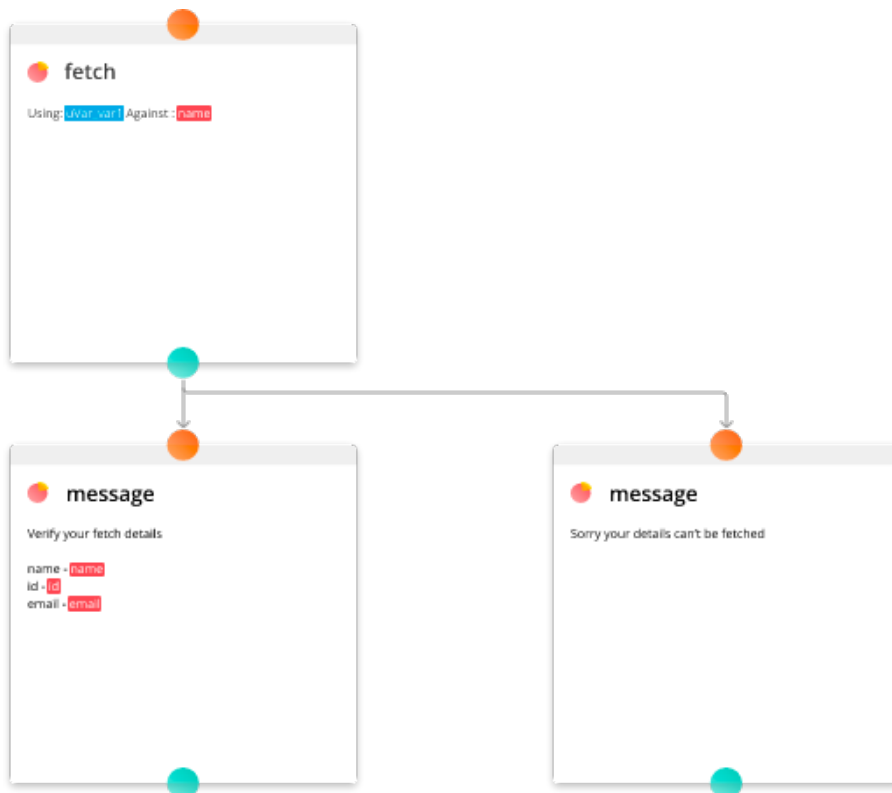
"Because it is a no-code solution and does not require a lot of development capacity, many of our mid-level business users have made headway into providing real solutions to the company when we have IT constraints. So, many of our business users have gotten on board with Ushur, and now we can get our workforce future-fit for the new world where they will need to be more technology savvy. I think that Ushur will create upskilling opportunities for our business analysts and front-office client services professionals," says Kiewitt.

Joseph Mataboge, a Business Process Engineer with PPS Short-Term Insurance, led his team in designing Invisible App workflows for customers who want to update their policies. "[Updating your policy] requires a bit of dynamism, so I would have expected to do some coding. Instead, we have non-technical people building workflows with no-code software. It is easy to use and even intuitive from an end-user perspective," says Mataboge.

POWERING THE FUTURE OF PPS CUSTOMER ENGAGEMENT

In the next step of the PPS journey with Usher, the client services team is busy testing SmartMail, Ushur's e-mail triage solution, to manage the current influx. As PPS accelerates its digital transformation, one thing is clear — in Ushur, they have a trusted partner in AI; no matter what customer journey, they automate next.

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