

**General de Seguros y General de Salud** are both 100% Mexican insurance companies with over 50 years of experience. These companies provide different types of insurance services such as automobile, property and casualty, life, health, and agricultural insurance.

As part of one of the fundamental pillars of our **Strategic Plan**, we developed the **ECO (Eficiencia Comercial)** (Sales Efficiency) project in conjunction with **London Consulting Group**. This project encompassed all of our divisions (**Automobile, Property and Casualty, Life, Health, and Agricultural**) and its objective was to capitalize on our sales potential:

- Develop a new customer service experience .
- Create a new environment for the sales department's users.
- Implement a **CRM** in the sales department which improves the customer and the user's experience.

### **Customer Experience (CX)**

A model was designed to provide the client with a more innovative experience. This experience included new installations accompanied by a new customer service process, through which the client, agent and promoter receive personalized attention with direct solutions.

### **User Experience (UX)**

Through a strategy that focused on segmenting sales and post-sales activities, the development of a work methodology, following up on KPI's using Power BI, and the implementation of management tools, we were able to capitalize on the company's sales potential. This enabled us to achieve the following results:

- **35% increase in revenue** vs the previous year.
- **60% reduction in the time that the commercial staff spend on administrative and operational activities.**
- **3.7 times more Premiums issued by new recruits** vs the previous year.
- **5% of revenue was generated via a cross-selling strategy implemented with 18% of the agents.**
- **Rehiring ex-sales agents** which now represent 6% of the total agents.

### **Digital Transformation (CRM)**

We implemented a CRM in the sales department to continue with the company's digital transformation strategy. This allowed us to optimize the time taken to complete the process, as well as simplifying it, which improved our customers' and user's experience. In order to do this we had to complete the following stages:

- Using the IT systems to **gather information** on the **fields' operations**.
- **Defining the pipelines** needed to obtain the CRM.
- **Defining the business rules** in order to program the application.
- Developing **functional requirements**.
- Carrying out **extensive tests**, from the calculation engines through to its overall functionality.
- **Designing training material** to carry out the pilot and launch.

The financial savings generated by the project yielded a **return on investment of 3.3:1** by the end of the project, with an **annualized forecasted return of 7:1**.

**London Consulting Group's methodology** was a deciding factor in the project's success; the way they managed change, their shoulder-to-shoulder implementation methods, and the level of commitment displayed by the whole organization, positively impacted our personnel's work culture.



Sincerely

Juan Ignacio Gil Antón  
VP Insurance Division  
General de Seguros / General de Salud