



# INSURANCE SUPPORT SERVICES - FBSPPL CASE STUDY



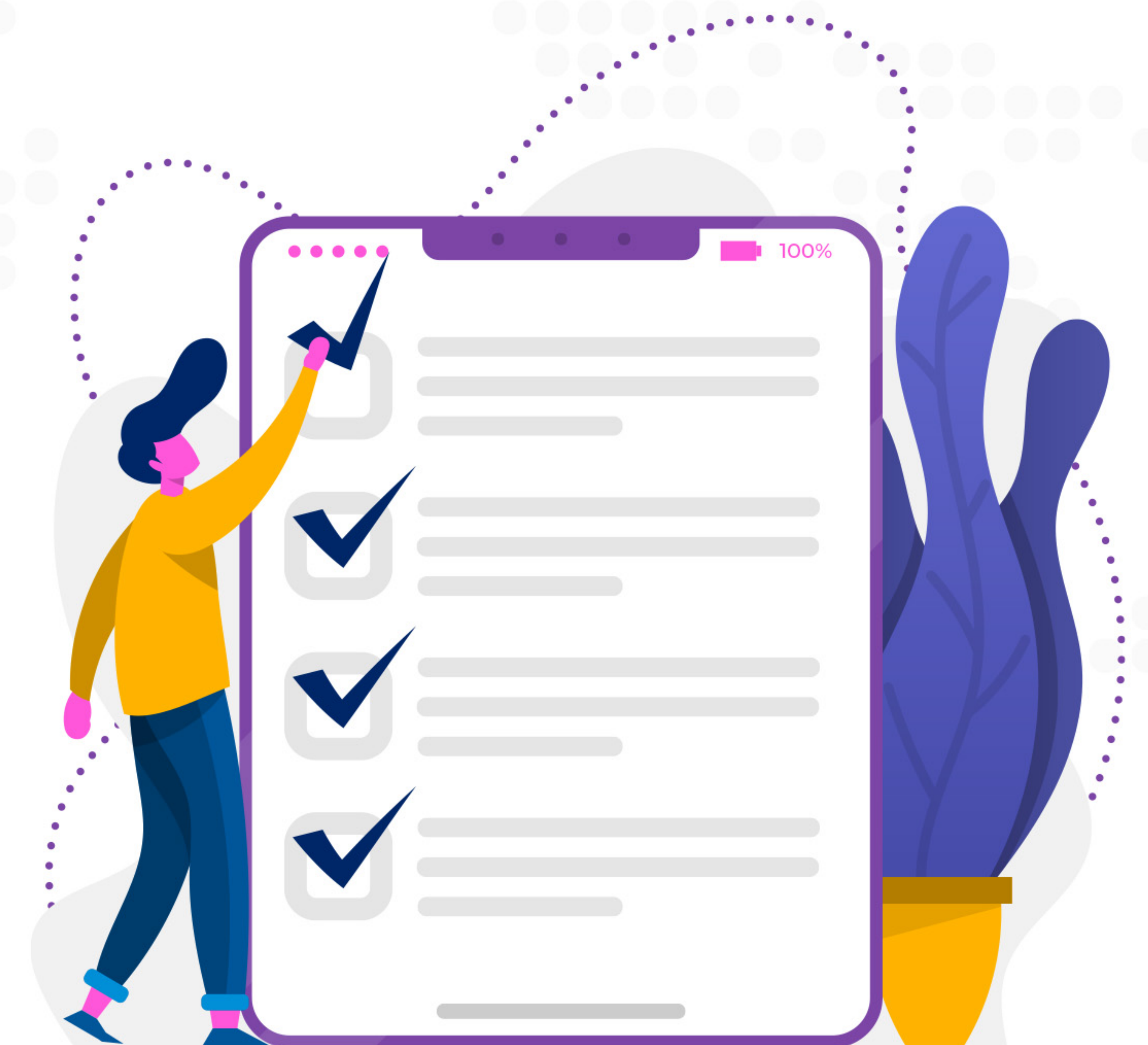
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### EXECUTIVE SUMMARY

Over the last few years, the client has shown a slow, steady growth process in the industry. The business could hardly earn new clients. Added to that, the fall of data systems and processes that did not keep pace, and the existing customers suffered too.

The internal team started losing interest in work and thought keeping up with the existing clientele was tedious and time-consuming. Additionally, some of them thought giving up their full-time jobs was challenging due to regular meetings and miscellaneous work.

With the dwindling situation, the company's leadership looked to Fusion Business Solutions to help change its direction from in-house working to remote staffing solutions. In January 2012, they thought to move the daily administrative work to virtual assistants for timely completion. And to be able to build and manage customer relationships in-house.





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### THE CHALLENGE

The client company must have grown through mergers and acquisitions, but the approach doesn't work anymore. The expectations have changed. The leading companies across the industries have raised the bar on service, and customers today expect to reach business easily on the web or phone.

Some of the places that suffered were customer support & cross-selling. Also, one challenge can be how to transact with virtual assistants for performing administrative jobs. The team of virtual assistants is required to work effectively and efficiently and deliver results.





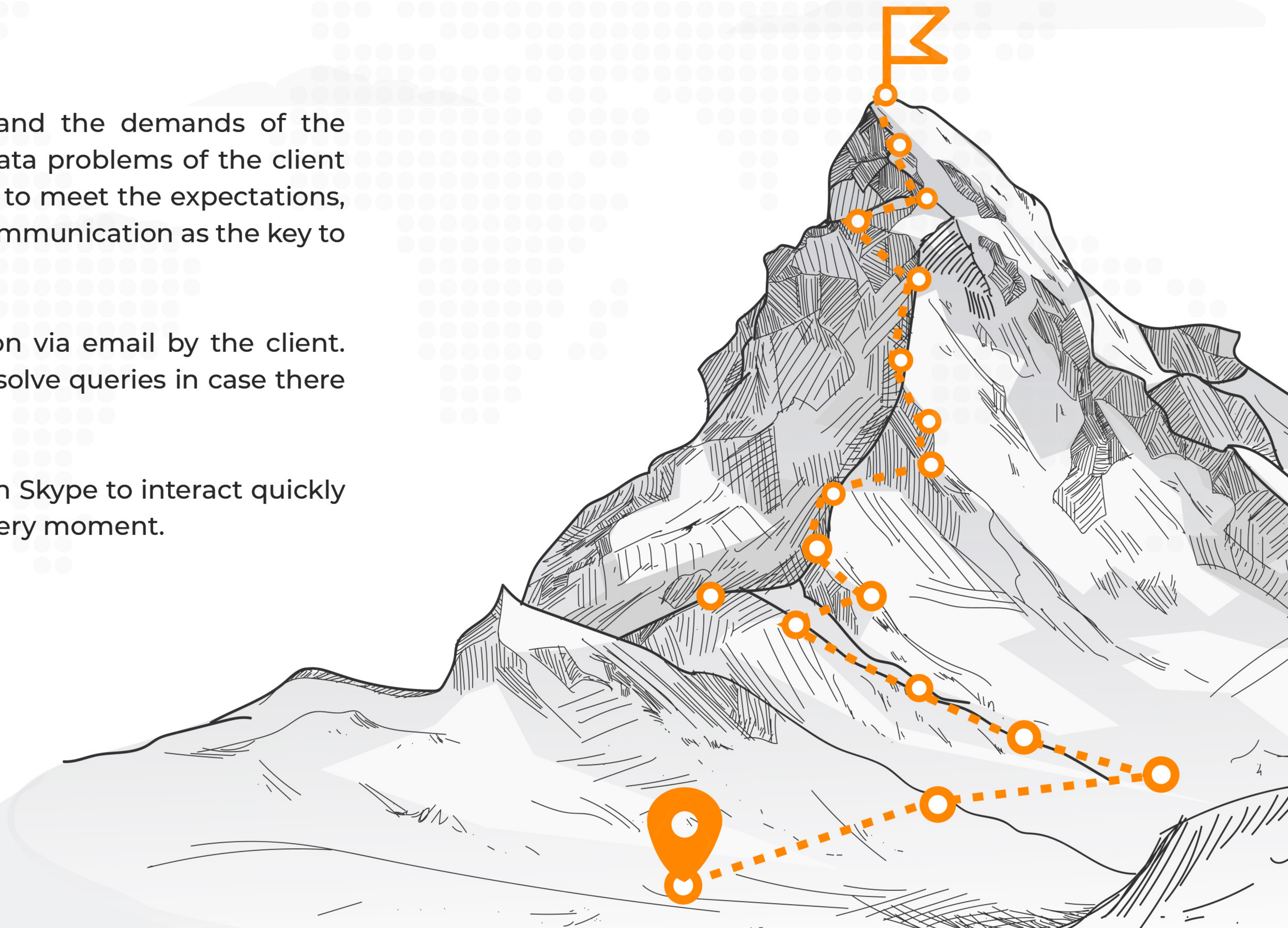
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### THE SOLUTION

The first step was to understand the demands of the business and customers. The data problems of the client were also massive. Additionally, to meet the expectations, both parties decided to keep communication as the key to bringing down the results.

The instructions were passed on via email by the client. She made sure to clarify and resolve queries in case there were any.

The training session was held on Skype to interact quickly and put back questions at the very moment.





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### KEY POINTS ON HOW WE HELPED

- We tried to ensure no gap in performance and expectations.
- The tasks were executed on time, and due to this, the cross-functional team were witnessed working towards a common goal.
- Despite the sufficiency of time, we tried to deliver the work on time, maintaining the expected quality.
- Being unhesitant in asking questions, we resolve all our questions on time because it is better to get it right on time rather than fixing it later.
- Beyond accurate data, the experimental process, technology, and training boosted the results.
- We removed a huge barrier by providing excellent customer service that was previously an epicenter of dissatisfaction.
- We understand the value of an ongoing relationship. Even if a new project intervenes, we do not let the client's face fall or comprise the quality results.
- We never let learning nature go and are always open to the new suggestions or tasks that the client escalates.
- We kept cross-training backup staff on the account] so as the work increased, it was easy to scale. Now we have a team of five virtual assistants assisting the clients.

The supportive and illustrative nature of the client was highly commendable and contributed to the fast learning of the appointed **virtual assistants**. Also, having an open-minded and true personality by our side as a client, it was smooth to turn her expectations into a reality.



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### THE CONCLUSION

The client's venture is on its way towards expansion or business development. And the reason for the change is the successful involvement of a Virtual Assistant from Fusion Business Solutions.

Now,

- The virtual assistants only handle all the administrative tasks on a single email instruction.
- Processing of policies is easy-to-do and requires no additional assistance.
- He creates invoices and sends that to clients.
- Management of all documents, policies and invoices is easily possible.
- He sends a reminder to the front team regarding policy renewal and outstanding invoices.
- He creates renewal presentations and updates them to the system.
- He processes the endorsements and updates them in the system or database.
- The virtual assistant now brings new ways of accomplishing daily workloads.



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### THE CONCLUSION

A massive transformation doesn't happen overnight; many changes are still being implemented. But, completing the above tasks proved to be directly proportional to business development.

The client and her team are no longer struggling to keep up with office work. Paperwork and other time-consuming jobs are delegated to the virtual assistants. She and the company's leaders have more time to focus on priorities like being more productive and profitable without losing time on weekends and other important occasions of life.

The client's goal was met with flexible timings, open communication, and an around-the-clock availability feature. It also cut-ed the cost of extra in-house employees substantially.



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