



Insurance Support Services



## CASE STUDY



### **Delighted Off-Shore Client with Effective Insurance Support Services**

Made headway upon the administrative jobs to make more time for business development steps.



## EXECUTIVE SUMMARY



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

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

With the dwindling situation, the company's leadership looked on to Fusion Business Solutions to help them change their 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 of them. And, to able to build and manage customer relationships in-house.



## 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 the business easily on web or phone.

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



## THE SOLUTION



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

The instructions were passed on via email by the client. She made sure to clarify and resolve queries, in case if there is any. The training session was led on Skype as a means to easily interaction and put back questions at the very moment.





## KEY POINTS ON HOW WE HELPED

- We tried to ensure that there is no gap in performance and expectations.
- The tasks were executed on time and due to which the cross-functional team were witnessed working towards a common goal.
- Despite 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 effective process, technology, and training gave a boost to 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 for the new suggestions or tasks that the client escalates.
- We kept cross training a 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 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 reality.



## THE CONCLUSION

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

Now,

- The virtual assistants are handling all the administrative tasks only 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 presentation 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.

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

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

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



## CONTACT US



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