

Centralised oversight of sales conversations for insurance provider

National Roadside Assistance and General Insurance Provider

National Roadside Assistance and General Insurance Provider centralises oversight of field sales conversations to improve transparency and effectiveness

A national roadside assistance and general insurance provider needed better oversight of decentralised field sales agents for central sales management. 110 field agents work across the UK in busy open environments, such as shopping centres or car parks, having approximately 10-minute conversations with potential customers.

The central sales management team wanted a way to record the conversations and digitally log data on what was discussed, and for this to be quickly and easily accessible by the central function. They wanted to be able to use the data to improve their sales processes and ensure the right products were being offered to the right people.



Recordsure solution

Recordsure provided the client with our Capture app which is used by field agents to digitally complete a purpose-built form for data capture and securely record their sales conversations to create a high-quality record of each interaction.

Our patented sophisticated, secure and tamper-proof audio fragmentation and encryption system for the temporary storage and upload of recordings offers complete peace of mind, and our easy-to-use Portal provides central access to previously unavailable data.



Capture

Sales agents use our Capture app, downloaded to mobile phones and tablets, to securely and unobtrusively record face-to-face sales conversations in a variety of busy environments, creating a reliable and authoritative record of the interactions the central sales management team would otherwise have no oversight of without physical observation.



Form

Sales agents complete a digital form within the app to capture data on the conversation, and to log the potential customer's consent to being recorded.



Portal

The form and recordings are uploaded to our Portal following completion of the conversation, so they are available for central access. The central sales management team use the additional data and MI to track sales performance and evidence how products are being sold, and to who. These efficiencies offset the resource burden of increased reviews that the new recordings created for the QA team.

Benefits

- Central oversight of decentralised sales conversations for a more transparent sales process
- Digital forms to replace the previous manual process for faster, more effective documenting
- Additional MI for better tracking of sales performance
- Improved sales processes and evidencing of the right products being sold to the right consumers

3YR

Time with Recordsure

1,700

Total conversations per month

51,000

Total conversations captured

110

Users