

cXomni

We Want to Shape, Not Just Manage!

The Customer Journey Management
of Generali Switzerland

Success
Story



Since 1987, **Generali Switzerland** has been a trusted partner for around one million customers, offering solutions for every situation. These include property, legal protection, and life insurance, as well as various retirement plans.

Since 2019, **Roberto Gago** has been with the Swiss insurer, responsible as Customer Experience Manager for the company's interactions with policyholders. To ensure all customer journeys are viewed holistically, he works closely aligned with the company's specialist departments.



Customer Needs Are Changing

This approach guarantees that customers remain the focus of every Generali activity. But due to digitalization, Generali is facing new challenges. "Times have changed," says Roberto Gago. "Our customers no longer just expect insurance coverage but a tailored solution for their individual needs, as they are used to from other industries."

Therefore, Generali must regularly adapt its processes, products, and services to remain competitive and meet evolving customer needs. "This is essential if we want to retain existing customers or attract new target groups like Generation Z," explains Gago.

Journey Management Challenges

- 01 Digitalization: Customers want a tailored solution for their individual needs.
- 02 Detailed view of customer journeys from granular to high-level.
- 03 Sociodemographic data provides not enough sufficient insights into behaviors and requirements of customers.

The Solution: Implementing Customer Journey Management

Generali has previously relied on a Transactional Net Promoter Score Program (T-NPS) to analyze the competitive situation in Switzerland for its CX management. Global Relationship Net Promoter Score (RNPS) measurements and the Moment of Truth Study (MoTT) are also used to gain a comprehensive picture of customer experiences. "Although we know our strengths and weaknesses," says Roberto Gago, "we realized that sociodemographic data is not enough to gain sufficient insights into the behaviors and require-

ments of our policyholders.” Because the Generali team not only wants to understand their customer’s needs, desires, and values, but also want know how they envision their future business relationship with Generali.

As a result, the company decided to implement Customer Journey Management. The team wanted to complement customer journeys with data to gain more detailed insights. By evaluating customer experiences in the journey context, Roberto Gago anticipated valuable insights from an inside-out perspective that should sustainably improve customer experience.

Coming from Design Thinking, Gago’s team had previously worked with whiteboarding tools like Mural and Miro. However, it quickly became clear that only a journey management platform would meet their requirements. Gago and his team wanted a tool that could not only visualize journeys beautifully but also help derive business requirements.

Thus, the decision was made for the journey management platform cxomni. “Because the features and technical setup were decisive,” says Roberto Gago.

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Thanks to the database structure of cxomni, we can capture all our customer journeys in a central repository.

Roberto Gago

Customer Experience Manager
at Generali Switzerland

How cxomni Supports Generali’s Customer Journey Management

The view styles in cxomni allow for flexible, different perspectives on a customer journey, helping to focus on various objectives. By visualizing customer pain points with heat maps, the software allows Roberto Gago and his team to immediately see where CX improvements are necessary.

It was also essential for Roberto Gago to view customer journeys at different levels of detail, from granular to high-level. With the high-level views of cxomni like the Executive Summary, which can be enriched with images and relevant information, Gago can quickly present authentic insights into the journey management status to the executive team. This is particularly important because Gago can present each stakeholder exactly the information that is relevant to their area of responsibility.

By establishing a scoring system, the Generali team can also generate transparency and prioritize which pain points need to be addressed to improve the customer experience. Important improvements can thus be tackled in a more targeted manner.

Cxomni also scored in terms of data protection: The ISO 27001 certification and banking security standard ensure that all data stays within the EU. This is particularly important for insurance companies with high-security standards.

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The Customer Success team at cxomni supported us very well with trainings for administrators, heavy users, and regular users. We focused on the necessary steps and were quickly ready to go.

Roberto Gago

Customer Experience Manager
at Generali Switzerland



Onboarding and Setting Up the Management Framework

As part of the onboarding, the Journey Management Framework was tailored to Generali's specifications with icons, images, taxonomies, terminologies, and information flow concepts. This ensures that later all project members have the same understanding regarding journeys and touchpoints.

The complete onboarding worked out. "The Customer Success team at cxomni supported us very well with trainings for administrators, heavy users, and read-only users," says Gago

After that, all personas, touchpoints, and current journeys with customer pain points from the studies were recorded and transferred into the software. The to-be journeys, including basic services and wow factors, and the derived business requirements were also documented.

"We wanted to capture 80% of our entire customer journeys for the insurance products in the areas of life, legal protection, motor vehicles, and household," says Roberto Gago.

"When designing the customer journey, we imagined what a customer would expect when working in cxomni. We focused on the necessary steps and were quickly ready to go," he summarizes.

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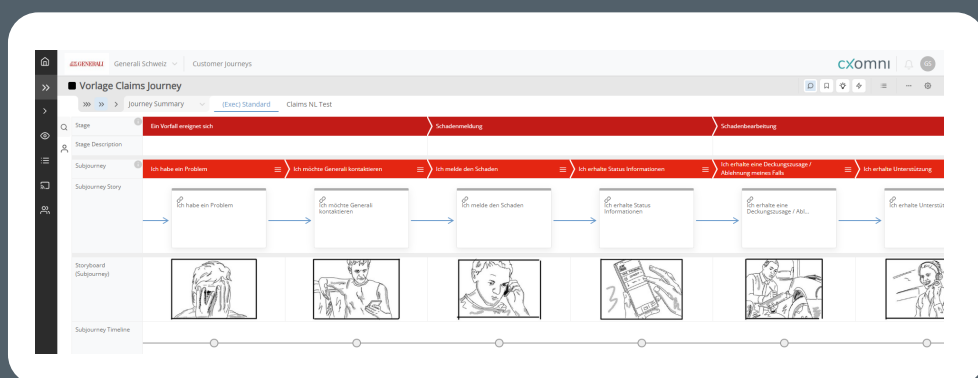
Roberto Gago

Customer Experience Manager
at Generali Switzerland

First Journey Management Successes Are Proven

cxomni supports Generali with communication and project management and ensures the implementation of metrics. The software directly shares the CX team's insights as tasks with those responsible in Operational Excellence, who then take care of implementation.

The focus is on all phases of the customer journey, including offer comparison, appointment booking via Interactive Voice Response (IVR), a 360-degree customer view, or basic functions like integrating the chatbot into the website.

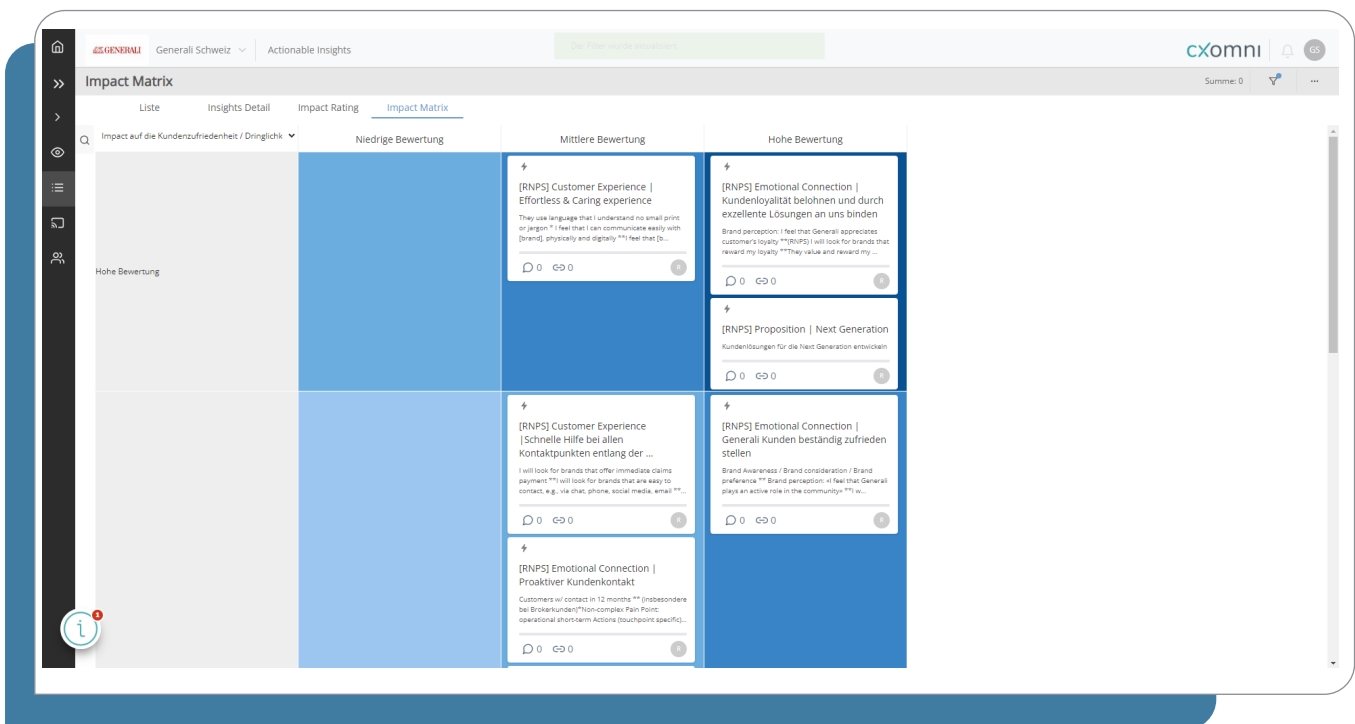


Visualisation of a claims journey in cxomni

A current highlight is the roll-out of the new customer center via web browser. Policyholders can now securely log in using two-factor authentication on their mobile phones and manage all insurance processes. “Journey analyses showed that customers often had issues logging in, such as forgetting their password or not having the correct app,” says Roberto Gago.

“We have now resolved this pain point. Thanks to the web browser solution, policyholders can visit the customer center from any device without needing to install an app.”

Performance measurement is also carried out in cxomni. The team integrates existing KPIs, such as T-NPS, RNPS, and the MoTT study, into the software via heat maps and links them to the touchpoints. This enables continuous monitoring of journey performance and sharing of valid reports on the impact of journey management.



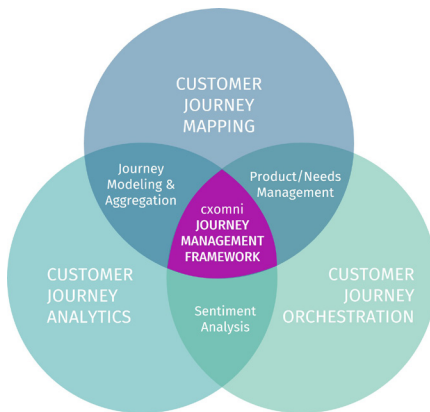
Impact Matrix and scoring system for measuring customer satisfaction

Journey Management Is a Continuous Process

The team is currently optimizing processes with Operational Excellence by creating clear customer journey responsibilities. The main goal is to provide the Operational Excellence team with customer feedback and studies.

Roberto Gago is satisfied but remains committed to continually improving customer experiences: “We want to shape rather than manage, and we have achieved that. With journey management and the tech stack from cxomni, we not only

monitor customer experiences but actively and sustainably steer them. This approach makes a decisive contribution to Generali’s success.”

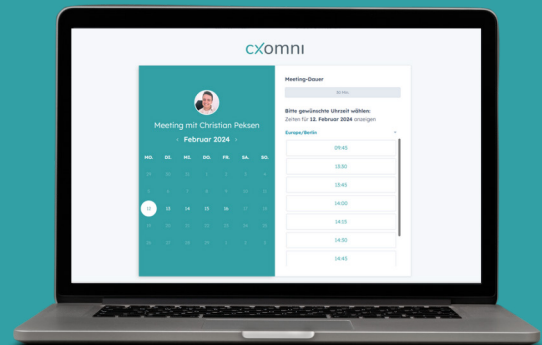


About cxomni

cxomni is the leading Customer Journey Management platform for aggregating and normalizing all CX data along the customer journey. The software enables customer-centric organizations to identify relevant customer insights, visualize them in the context of the journey, and orchestrate needs and requirements to stakeholders.

Do you have questions about setting up a holistic Customer Journey Management or are you interested in a software demo?

Contact us now



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