OPTIMIZING THE QUOTE-TO-BUY JOURNEY: DRIVING CONVERSIONS WITH SITECORE FOR A HEALTH INSURANCE COMPANY

DATAMATICS

Industry:

Healthcare Insurance

Region:

Europe

About the Client:

The client is a leading European healthcare insurance company that offerss a variety of digital insurance services and products. Through its website platform, the company provides easy access to medical insurance quotes and policy purchases for individuals and families who prioritize online engagement.

The Challenges: Driving Online Insurance Sales

The client, a health insurance company in Europe, was having trouble turning website visitors into paying clients. Their Quote & Buy journey was performing below industry standards, even though they had a consistent stream of online traffic. This disparity brought to light important problems with digital flexibility, sales performance, and user experience.

Key challenges included:

- **Low Conversion Rate:**
  Only 3.8% of users who received an online quote completed a purchase
  - 1.1% lower than the industry average
  - 0.3% lower than the client's own previous year's performance

- **Revenue Impact:**
  Due to poor conversion rates, overall sales were 23% behind plan.

- **Outdated User Experience:**
  The quote journey was too long and unclear, leading to customer drop-offs.

- **Lack of Promotion Flexibility:**
  Promotional models were often displayed incorrectly, resulting in lost revenue opportunities.

The Solution: Enhancing the Digital Quote-to-Sale Journey

Datamatics carried out a thorough digital makeover with an emphasis on usability, accessibility, and personalization in order to address the conversion and experience issues. Making the Quote & Buy process smooth, easy to use, and entertaining for users on all devices was the aim.

Key solution highlights:

- **Cloud Hosting on Azure:** The application was hosted on Azure, providing a scalable, secure, and high-performance infrastructure to support smooth operations and high traffic volumes.

- **Responsive Web CMS on Sitecore 8.2:** Built a responsive website using Sitecore 8.2, ensuring consistent user experience across desktops, tablets, and smartphones.

- **Simplified Webpage Widgets:** Streamlined content blocks and interactive elements to improve navigation and overall usability.

- **Modern Front-End & Security Enhancements:** Leveraged CSS3 and jQuery for dynamic, responsive UI, along with robust security controls to protect personal data.

- **Efficient Data Capture:** Designed a smooth, user-friendly interface to collect member information quickly and accurately.

- **Interactive Chatbot Integration:** Enabled real-time assistance for users to explore insurance plans, policy details, and FAQs.

- **Revamped Quote Summary Page:** Redesigned the summary section to clearly show policy features, exclusions, and comparisons at a glance.

- **Use of Avatars (Digital Agents):** Added virtual agents to give a human-like touch to online interactions, improving customer comfort and engagement.

The Impact

360-Degree Customer View
Targeted marketing and sales campaigns were made possible by advanced analytics.

Improved Conversion Rates
A streamlined journey led to higher online policy purchases

Reduced Revenue Leakage
Controlled display of promotions through CMS minimized losses

Expanded Customer Reach
More payment options and easier navigation attracted a wider audience

ABOUT **DATAMATICS**

Datamatics enables enterprises to go Deep in Digital to boost their productivity, customer experience, and competitive advantage. Datamatics' portfolio spans across three pillars of Digital Technologies, Digital Operations, and Digital Experiences. It has established products in Intelligent Document Processing, Robotic Process Automation, AI/ML models, Smart Workflows, Business Intelligence, and Automatic Fare Collection.

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