

## Case Study: Aon



### Challenge

To remain competitive in a changing market, and retain its position as a leader in the insurance brokerage and risk management consulting space, Aon realized that it would have to be more strategic in how it managed clients' satisfaction and retention. However, Aon had limited visibility into customers' experiences: Its existing process gathered information on customer policy and coverage details, and little else.

David Cliche, Vice President, Global Interactive Marketing at Aon Corporation, elaborates on the challenge: "We recognized that we needed to better understand what our customers wanted and expected beyond our regular interactions with them. We needed to do something different, and implement a solution to help set ourselves apart from the competition. The challenge, as with any industry in today's economy, is achieving our goals efficiently without additional strains on our already busy people."

Aon wanted to increase customer retention with a solution that enabled them to engage in a focused dialogue with their customers and ultimately better understand their customers' experiences to identify opportunities for improvement.

### Solution Snapshot: Insurance Risk Management

#### Customer Profile

Aon Corporation, [www.Aon.com](http://www.Aon.com), is a leading provider of risk management services, insurance brokerage, and reinsurance brokerage. Aon Corporation has 45,000 employees across 500 offices in more than 120 countries. Aon is ranked in the top 250 on the Fortune 500 list.

#### Our Solution

With a better understanding of customer experiences, and the ability to implement improved business processes, ResponseTek is helping Aon identify new revenue opportunities and increase customer satisfaction.

#### Solution & Services

ResponseTek:CEM including:

- Real-time reporting and dashboards
- At-risk and alert communications
- Action management and closed-loop communication
- Company- and event-initiated collection
- Churn management best practices

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“ We had to respond to the changing competitive landscape of the insurance industry and look for an alternative way to make better-informed business decisions. ResponseTek helped us accomplish this by enabling us to integrate the voice of our customers into our business processes. ”

David Cliche  
Vice President, Global Interactive Marketing  
Aon Corporation

## CEM Benefits

With ResponseTek, Aon has been able to:

- Improve customer experiences
- Increase customer retention
- Improve service delivery and operational efficiencies
- Identify new revenue opportunities

## Solution

The answer to Aon’s business challenges was ResponseTek’s Customer Experience Management (CEM) solution. ResponseTek:CEM helps Aon involve, integrate, and improve its customers’ experiences. The implementation includes: timely collection of customer experiences; a real-time dashboard with customer experience details relevant to each user’s role; and an early warning system to identify at-risk customers.

“We knew we had to be visionary, and we felt that ResponseTek was the partner to help us get there,” says Cliche. “Many people talk about customer experience management, however, they don’t truly incorporate the customers’ voices into their business strategy. We needed a leader in the field to give us guidance and best practices, and at the same time, out-of-the-box thinking. They also shared our vision of (customer) experience excellence.”

## Results

### Real-Time Information

Using ResponseTek:CEM, Aon collects information about customer interactions as they occur at the pre- and post-renewal stages of the customer lifecycle.

Customer experience information is continuously gathered and delivered to Aon staff, who use it to improve the customer experience. “With ResponseTek:CEM, we ask our customers for real-time insights to understand their needs and keep pace with the changing market,” says Cliche.

### Reducing Customer Churn

Managers now receive reports detailing customer advocacy by region. As a result, their sales team has valuable, accurate, and relevant customer information to better deliver what customers want. ResponseTek:CEM also acts as an early warning system to identify at-risk customers. Client managers initiate conversations with those customers to save the relationships.

### Improving The Business

With ResponseTek:CEM, Aon executives have increased visibility into their customers’ experiences. With issue and action management functionality, ResponseTek:CEM allows Aon to quickly resolve issues, implement customer-driven improvements to products and services, and communicate those improvements back to the customer. Executives can share best practices and ensure the company is focused on the core of the business: being strategic advisors to their customers.

Aon is also better positioned to implement proactive business planning based on client customer experiences. “We now know a lot more about our customers than we did before,” says Cliche. “Rather than one touch-point, we are now able to understand our interactions with our customers throughout their lifecycle. Knowing what our customers want, and the complementary products and services they need, is invaluable information.”

### Growing Relationships

In addition to improving individual client experiences, Aon has applied what they’ve learned to other clients to provide them with better services and find new revenue opportunities. Cliche explains: “After we respond to clients in a way that is specific to their needs, we use that information to proactively address needs that haven’t yet emerged for other clients.”