



Portima is a global IT partner of insurance professionals with the mission to build an environment in which insurance brokers and companies do business quickly and securely. Portima launched the brokers' package BRIO, BRIOplus, AS/2 and AS/Web for office management. The package is constantly being extended and, in cooperation with users, adapted to the needs of a modern brokers' office.

A multimedia contact center for insurance brokers

Portima has set up a new contact center aimed at better serving customers. The quick identification and correct customer routing are of prime importance since insurance brokers do not want to be troubled by extensive IVRs. Altitude Software supported this strategy that has led to an increased customer satisfaction. The way the contact center works has also been changed, resulting in 89 percent of calls answered within 30 seconds.

Portima's Brokers Contact Center

The decision to switch to Altitude Software as the contact center software supplier occurred in 2002. Since then insurance brokers, and to a lesser degree employees of the insurance companies, can contact them with questions and problems concerning all the services (the network, hardware and BRIO software) provided by Portima. The multimedia contact center has 25 agents (first and second line), all on the same floor, with specific skills to provide solutions for the problems that the contact center receives by phone, email or fax. Between January and July 2007 there was an average of 5,713 calls per month of which 5,149 were telephone calls, 180 fax messages and 384 emails.

Path and routing: skills

When a call arrives at the contact center, the Altitude Software system delivers the call to the right agent according to a defined number of skills. The language, technical and package skills automatically lead a caller with a specific technical problem to an agent with skills for the technical subject and that speaks the caller's language.

If all agents that have a specific skill are busy, the system uses an intelligent overflow to seek a free agent that bears the closest resemblance to the requirements of the customer. In some cases Portima can go as far as to enable a specific customer to speak to a preferred agent.

“Altitude Software enables us to collect figures on all variables in a practical fashion. We can therefore gain a clear view of how many consultations an agent deals with and what the average length of a consultation is. We can also see which brokers the agent has spoken to.”

*Christophe Arnould
Portima Contact Center Manager*

Customer Data

- Portima is the global IT partner of insurance professionals
- In 1986 several major insurance companies set up Assurnet
- Assurnet negotiated the purchase of some important management programs and changed to Portima in 2000.

Business Benefits

- 89 percent of calls are dealt with within 30 seconds
- 100 percent of faxes and e-mails are dealt with within 30 minutes
- 87 percent of cases were solved found within four hours.

Information for the agent

When the contact center receives a call from a customer, the agent application pops up a window with information about the customer, such as name, address, language, contracts, outstanding tickets, complaints and the history of the most recent calls. The window also shows the customer's financial details. If the customer has outstanding invoices, the system displays a red flag to alert the agent to this fact. The agent can then decide whether to put the customer through to the financial department first.

The results of Portima's new contact center are very satisfying, as demonstrated by the figures, which are even better than the assumed Service Level Agreements (SLAs).

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Altitude Solution's Advantages

- **Flexible and easily integrated:**
The applications that Altitude Software offered could be seamlessly incorporated into the existing systems, such as ticketing.
- **More customer-friendly**
The limited IVR, skills-based routing and the call-back system provide a pleasant experience for customers.
- **Cost savings:**
The software and solutions offered by Altitude Software required less staff. Using the skills-based approach, the broker immediately talks to the right agent.

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