



## Enabling effective Change Management

How Old Mutual gained visibility over their CX processes



## Who is Old Mutual?

Old Mutual is a premium pan-African financial services group that offers a broad spectrum of financial solutions to retail and corporate customers across key markets in 14 countries. We spoke to Jan Marais, Head of Innovation and Efficiencies at Old Mutual, to hear his thoughts on how ConnexAI helped the company welcome Change Management.





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**Jan Marais**

Head of Innovation and Efficiencies at Old Mutual



## What Old Mutual says about us

### How would you best describe Old Mutual?

Old Mutual is a 175-year-old insurance company and within our specific department, we specialize in the short-term insurance leg of the company. The core part of our work is to drive the turnaround strategy of our business.

### What are your strategic goals to achieve higher efficiency?

Our goal was to incorporate the Omnichannel and dialler components of ConnexAI to assist us with these efficiency goals. At first, we were concerned we would receive some pushback from the agents introducing new technology, yet the change management was welcomed with open arms, and that's due to the simplicity of the system.

### What key aspect of the system was most welcomed?

The system presents the agents with the customer interactions they need to work on at the correct stage in the cycle. It is having the combination of a system that can give the consultant the correct contact at the correct time. Introducing these efficiencies to the sales process has brought our quoting time down from 11 minutes to 3 minutes. It's a simple design, yet unique and the functionalities of the reports where you can visually see them in real-time are great.

### What are the benefits of having a Cloud-Based System for you at Old Mutual?

Having a cloud-based system makes our lives much simpler from an IT perspective. We are now able to push the business requirements with technology so much quicker.



## What does the future look like for Old Mutual?

We have an aggressive omnichannel strategy that we want to drive within the next year. The biggest component of that is to get all the back office people onto ConnexAI - using it specifically for client interaction management - which would mean emails, instant chats, and utilising chatbots. Going forward, if the consultant has access to our network and has access to a browser, they can do their work. We want to work closely with our business partners to have a single interface to work from without a complicated network requirement.

## What would you say are some of the key value-added benefits of using ConnexAI?

One of the important values we are getting from the system has been the efficiencies of the call centre agents' time spent making sales. We have had a big focus on the sales process at the back, we reworked the underlying architecture, we built streamline products, and, we saw a big push for our improvement of contact ability perspective. ConnexAI has given visibility of that, now our call centre agents are more efficient and we can see that. Leads are no longer lost when there is no answer, the lead always gets dialled. This eliminates the need for lead auditing.

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## How does having a visual overview of your operations impact your team's efficiency?

From a manager's perspective, visibility has changed in a big way. In the past, we would operate in a very manual way, if you wanted a report for talk time you had to go to every sales agent and pull their talk time and dials, you had to manually look at what the quotes and sales were looking like. ConnexAI simplified this for us with just a click of a button. The reports are also live, whereas, in the past, reports would be reviewed the following day.

## How does the system aid Managers in their role?

For the managers to manage our people more effectively, ConnexAI gives us that advantage we can sort out any issues right there and then. If you manage people in a sales environment, time plays a big role. If you want to stay relevant in the market, you need to get things done quickly and resolve things as quickly as possible.

## How does the simplicity of the ConnexAI system benefit your work processes?

There's no complexity involved, whether it's stats related, channel related, everything you are looking for is right there on ConnexAI. In addition, the data continuously saves whereas with previous systems, after a couple of days the data would disappear. ConnexAI allows an agent to log on and speaks to a client they last spoke to a week ago, to quickly pick up from where they last left off.

## What advice would you give to other industries in your field?

If you want to simplify the way you are working and you want to see results, for myself considering various systems I've worked with in the past, the only question would be why are you not on board yet? ConnexAI will change your world and the way you do things indefinitely.





To learn more about how ConnexAI  
is helping businesses to  
overhaul their customer journeys

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