



Cutting-edge technology cuts administrative time and improves customer satisfaction

CHALLENGES

Frustrated by a time-intensive manual process for scheduling their continuing education courses for Financial Advisors, this insurer turned to Universal Wilde. They challenged us with developing a solution which reduced the administrative time associated with inputting and verifying data between an internal system, a state-regulatory website and a spreadsheet needed by their print vendor.

SOLUTION

The experts at Universal Wilde customized the user interface of its state-of-the-art communications platform, Xccelerate™, allowing users to schedule their courses and order print materials. In the back-end, business rules determine which courses a user can schedule based on their state and government regulations. Administrators at the insurer can approve or reject course submissions.

RESULTS

- Administrative time required for scheduling CE courses was reduced by 80%
- Improved satisfaction by field sales reps and their customers with course materials
- Program evolved to personalized and dynamically-printed course certificates for attendees

This Fortune 500 client is one of the largest life insurers in the United States. They offer a broad range of life insurance, mutual funds, college-savings, retirement solutions, long term care insurance and more.

They also support financial advisors by offering Continuing Education (CE) courses.



FOR MORE INFORMATION

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