



# BUSINESS OUTCOMES

**INDUSTRY:**

Insurance

**SOLUTION:**

Select Assessment® for Customer Service

## Improving Close Ratios for Outward-Bound Call Center Agents

Authors: Matthew O'Connell, Ph.D., Mei-Chuan Kung, Ph.D.

### The Situation

Selling auto and homeowner's insurance policies is never easy. Convincing customers to switch from their current provider to policies that your company offers is potentially even harder. One of the key challenges faced by an organization that offers multiple services, including insurance, is to leverage your customer base and try to expand the scope of services they use while not alienating them from your core offerings. It's a fine line to walk, and one that you don't want to cross.

This organization wanted to improve the selection of these customer service agents (CSA's). The key metrics of interest were the number of home and auto policies sold as well as the close ratio for these two products.

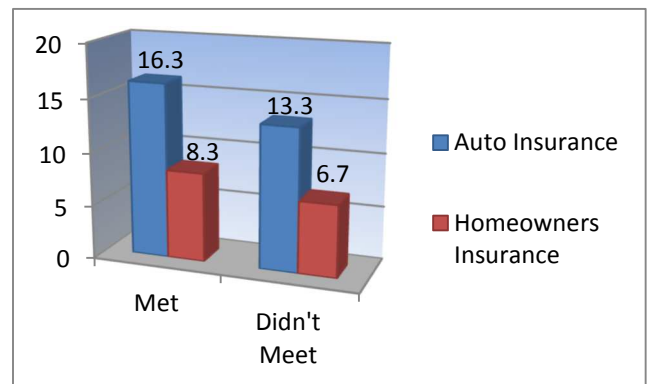
*One key challenge faced by an organization that offers multiple services, including insurance, is to leverage your customer base and try to expand the scope of services they use.*

### The Solution

Customized profiles of the Select Assessment for Customer Service (SACS) were created for this organization based on an analysis of the job and previous research findings. The SACS system, which incorporates personality, realistic sales and service scenarios, typing and multitasking simulations into a concise and interactive package was utilized as part of the selection process for these CSA's. To evaluate the effectiveness of the SACS solution, a group of current salespeople took the assessment.

### Outcomes

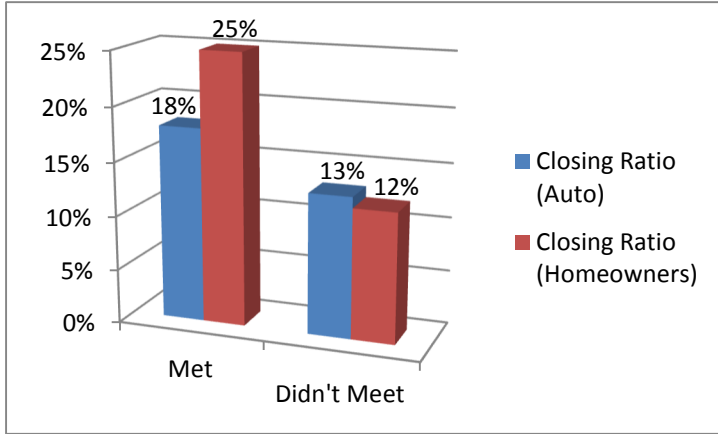
Comparisons of individuals who "did not meet" the SACS profile, and those who "met" the SACS profile are shown in the following two graphs.



- **22% more Auto Insurance sales**
- **25% more Home Insurance sales**



## BUSINESS OUTCOMES



- **38%** higher monthly closing rate for Auto Insurance
- **98%** higher monthly closing rate for Home Insurance

What is perhaps most impressive about these results is that these are for individuals who are already in the job, have been trained and have experience in selling these policies. The only difference was that some met the SACS profile and some didn't. ***In home insurance sales in particular, this difference resulted in a close rate that was almost twice as high for those who met the profile.*** Clearly, these results translate into significant revenue for this organization over time.

For over 20 years, Select International, Inc. has provided superior assessment products and solutions for its clients. Many of the world's largest and most successful organizations trust us with their hiring and retention goals. Whether your company needs pre-employment screening, personnel evaluation, in-depth leadership assessment or behavioral interviewing, Select International has a solution to meet - *and then exceed* - your needs.

**Select International, Inc.**  
5700 Corporate Drive, Suite 250  
Pittsburgh, PA 15237  
800-786-8595  
[www.selectinternational.com](http://www.selectinternational.com)