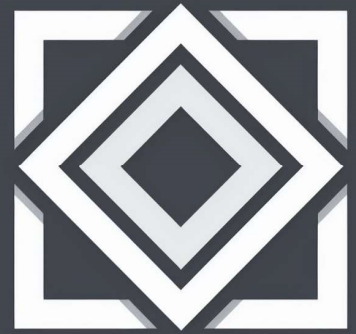


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Quick Quotes Tool

Introduction

Page | The Quick Quotes Tool was developed to address inefficiencies in the note-taking process within a 1 CRM system at a regional insurance company specializing in business and vehicle insurance. This project aims to standardize note-taking, reduce processing time, and minimize miscommunication.

Background

Note-taking in CRM systems is crucial for maintaining accurate records of client interactions and insurance plans. However, manual note-taking is often time-consuming and prone to errors, leading to miscommunication and incorrect information being recorded.

Problem Statement

The problem was that note-taking on the databases, particularly in the CRM system, was taking far too long. Notes were being written by processors and call handlers, often containing incorrect information about clients' insurance plans. This led to assumptions based on inaccurate data from previous notes.

Objectives

The objectives were to:

1. Standardize 80% of notes, making them easily copyable to client records with one click, reducing the need for ad-hoc typing.
2. Ensure that only subject matter experts (SMEs) curate the notes to accurately reflect the nuances of the insurance products.

Literature Review

A review of the literature highlights the importance of standardizing data entry processes in CRM systems to improve efficiency and accuracy. Previous studies have demonstrated that automation tools can significantly reduce data entry errors and processing time.

Methods

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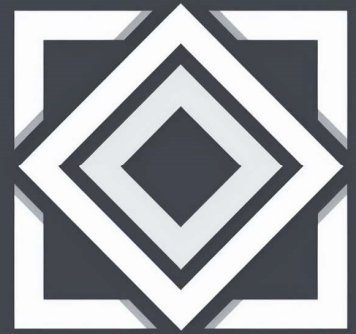
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Excel was utilized to create a customizable pivot table, categorized by insurance product type and department. Visual Basic and ActiveX code were employed to add copy and paste functionality, allowing users to quickly transfer pre-written notes into the CRM system.

Page | **Project Design**

- The project involved designing an Excel-based tool that allowed for the quick copying of standardized notes. Subject matter experts were consulted to ensure the accuracy and relevance of the notes.

Setting

The setting was a regional insurance company specializing in business and vehicle insurance. Details are retained for anonymity.

Participants

Participants included processors, call handlers, and subject matter experts from the insurance company.

Intervention

The intervention involved the implementation of the Quick Quotes Tool, which streamlined the note-taking process in the CRM system by providing pre-written, standardized notes.

Data Collection

Data was collected on the time taken for note-taking and the accuracy of notes before and after the implementation of the Quick Quotes Tool.

Data Analysis

Data analysis involved comparing the time taken for note-taking and the rate of note-related miscommunications before and after the implementation of the tool.

Results

The implementation of the Quick Quotes Tool resulted in:

- A 33% reduction in processing time.
- A 74% decrease in note-related miscommunications over an 8-month period.

Tables and Figures

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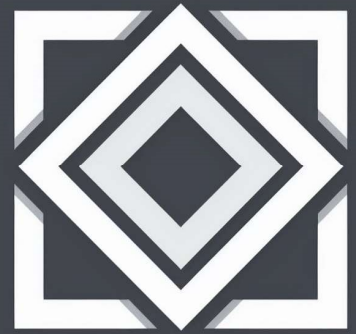
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(Tables and figures illustrating the reduction in processing time and miscommunications should be included here.)

Discussion

Page | The Quick Quotes Tool effectively addressed the inefficiencies in the note-taking process, leading to
3 significant improvements in processing time and accuracy.

Interpretation of Results

The results indicate that standardizing notes and involving subject matter experts in their creation can substantially reduce errors and improve efficiency in CRM systems.

Comparison with Literature

The findings are consistent with the literature, which emphasizes the benefits of automation and standardization in data entry processes.

Implications for Practice

The Quick Quotes Tool can serve as a model for other organizations facing similar challenges in their CRM systems. Standardized notes and automation can lead to improved efficiency and accuracy.

Limitations

One limitation of the study is that it was conducted within a single regional insurance company. Future studies could explore the tool's effectiveness in different settings and industries.

Conclusion

The Quick Quotes Tool successfully streamlined the note-taking process in the CRM system, reducing processing time and miscommunications. By standardizing notes and involving subject matter experts, the tool ensured accuracy and efficiency, demonstrating its potential for broader application.