

National Insurance Sales Force Transformation

Redesigning the channel model and technology platform for a 2,000+ agent sales force

The Challenge

A Global Top-20 insurer sought to transform its traditional Australian tied-agent sales force of more than 2,000 agents.



AT A GLANCE

2,000+

Sales agents

Australia

Global Top-20 insurer

\$10m

Workbench development & rollout

Our Approach

- **Technology Assessment**
Evaluated emerging technologies and their implications for the sales force.
- **Channel Strategy**
Managed agency reorganisation and redesign of the channel model.
- **Workbench Design**
Developed requirements for the agent workbench and backend integration.
- **Rollout Planning**
Supported the \$10 million development and rollout programme.

Outcome

Successful pilot and progressive rollout within 18 months, retention of experienced agents and customers, and approximately 20% improvement in agent productivity.

Experience Across the Journey

