Case study

daktela

Virtual Assistant Leo Celebrates Success at Generali

How did communication look before the introduction of virtual assistants?

Chatbot

Chatbot Leo has been helping clients of Generali Czech Insurance since April 2020. Before implementing the chatbot, a standard chat solution without AI and NLP was used. Customers had the option to be directly connected to an operator. Meanwhile, the insurance company's operators used a QnA maker, which sometimes suggested answers to them.

The gradual increase in chat conversations forced the insurance company to consider partially automating communication with customers. At the same time, Generali Czech Insurance aimed to divert phone calls to chat. The goal of implementing the AI chatbot was to handle certain end-to-end processes and manage about 30% of conversations through the chatbot.

Voicebot

The aim of introducing the voicebot was to simplify the path for clients to the insurance company, gain more from replacing IVR, and utilize more integrations with their systems.

Before introducing the voicebot, Generali used standard push-button IVR (interactive voice response), a technology that routes callers to the appropriate departments in the call center by pressing numbers at the beginning of the call. From integrations, they used only client verification over the phone, where an operator still had to verify the client afterward.

GENERALI ČESKÁ POJIŠŤOVNA

One of the largest Czech insurance companies, which decided in 2018 to enter the world of artificial intelligence. They welcomed virtual assistant Leo as a new colleague.

„We now consider IVR (call steering) as a channel where we can help the client without the need to connect with an operator. However, we always give the client the option to ask an operator for more information if they wish."

- Jakub Haman, Business owner for Chatbot/Voicebot

Why Daktela?

The priority was the simplicity of the application and the user interface. At Generali Czech Insurance, they wanted to change dialogues themselves in a moment without the need for migration. They were particularly impressed by the simplicity of the administrative environment and the speed of implementation. Last but not least, the price was also a factor.

What has the new solution influenced?

Chatbot

The chatbot deployment most significantly affected the operators, who no longer need to ask clients certain additional questions about their queries; the chatbot already does this for them. Overall, the proportion of general queries (e.g., branch opening hours, how to pick up a document, how to log into the Client Zone, etc.) decreased. Chatbot Leo is an impressively designed and processed chatbot, as confirmed not only by Generali Czech Insurance clients but also by the professional public.
What awards has Leo already won?

1. place	TOP 5	Insurance company of the year
in the Technology category in the seventh annual Czech Contact Center Award.	TOP 5 project in the Zlatý středník competition in the Mobile Applications and Innovations category.	Thanks to continuous digitalization and process automation, Generali Czech Insurance also became the winner of the Insurer of the Year 2020 competition.

It turns out that a conversational chatbot equipped with artificial intelligence is not only a quality assistant but also does a lot of work for PR and the image of the company as a technology leader.

Voicebot

Thanks to the voicebot, an already verified customer is connected to the operator. Operators do not have to ask clients for verification information. Customer support has a better overview of what clients are calling about, and the percentage of transferred calls has also decreased. Generali Czech Insurance began to think more about using automation within the IVR. They are now able to fully handle certain types of requests within the IVR (e.g., objective cancellation).

How long did the implementation take?

The introduction of the chatbot with potential integrations took approximately 6 months. The entire project then lasted about a year and a half, but this included the implementation of ECE and Surfly co-browsing. The implementation of the voicebot without integrations into internal systems took about 5-6 months, and the voicebot project has been ongoing for a year and a half.
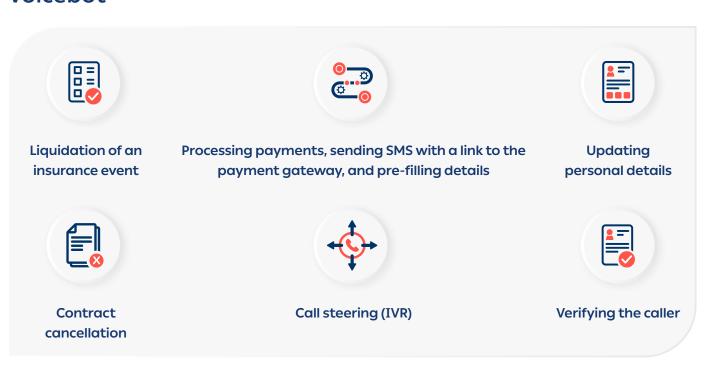
Automated Scenarios

Together with Generali, we first identified recurring situations where virtual assistants could be most helpful. From a sample of tens of thousands of chat discussions, we identified the following cases:

Chatbot

Attaching documents

Arranging insurance

Reporting an insurance event

Logging into the client zone

Voicebot

Liquidation of an insurance event

Processing payments, sending SMS with a link to the payment gateway, and pre-filling details

Updating personal details

Contract cancellation

Call steering (IVR)

Verifying the caller

And what results has the chatbot brought?

Chatbot

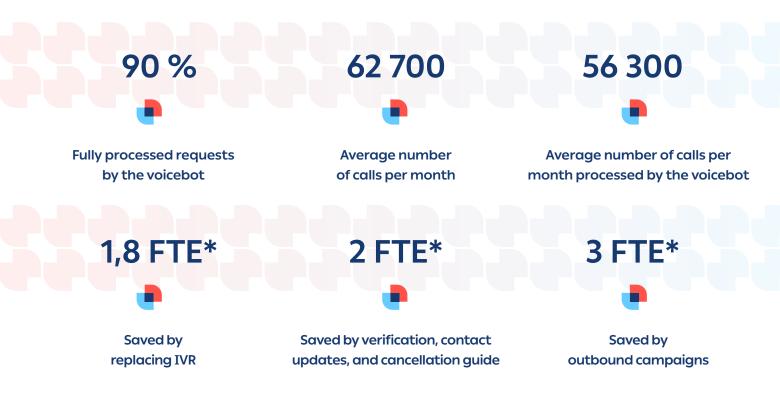| **62 %**	**13 700**	**8 500**	**6 FTE***
Fully processed requests by the chatbot	Average number of chats per month	Avg. number of chats per month processed by the chatbot	Saved by the chatbot

Generali Czech Insurance reports an increase in chat communications and at the same time a decrease in calls. This confirms the fact that clients are increasingly using self-service solutions. Thanks to virtual assistants, greater emphasis is placed on digitalization and modern technology. The nature of work has also changed, and with the introduction of virtual assistants, a new position of methodology-technologist has been created, tasked with caring for and developing this technology.

Voicebot

90 %	**62 700**	**56 300**
Fully processed requests by the voicebot	Average number of calls per month	Average number of calls per month processed by the voicebot
1,8 FTE*	**2 FTE***	**3 FTE***
Saved by replacing IVR	Saved by verification, contact updates, and cancellation guide	Saved by outbound campaigns

Thanks to the implementation of smart IVR and the reduction in transfers between operators, Generali Czech Insurance saves almost 2 FTE. Generali appreciates that the chatbot has met their expectations and opened up new possibilities for efficiently managing clients.
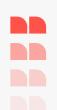
FTE = Full-Time Equivalent

What does Generali Czech Insurance say?

Try it on a small pilot project and don't be afraid. Some results may not be apparent at first, but once you dedicate enough time and have support from the provider, you will surely achieve your set goals. Automation is certainly a topic of today, and sooner or later, everyone will have to implement it – so go for it with gusto, we're rooting for you!

- Jakub Haman, Business owner for Chatbot/Voicebot

If you would like to learn more about the possibilities of Daktela, please contact us!

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