RISON SOFTWARE
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VIRTLX™ Case Study
More than an Engagement Platform

McClarrons Insurance Brokers
Insurance – Employee & Customer Engagement

McClarrons

About the client

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McClarrons insurance brokers – Service without Compromise

Defined by their service, McClarrons insurance brokers offer independent advice and support to SMEs, corporations, farms, care organisations, charities and individual clients.

Originating in Malton – North Yorkshire, United Kingdom, and currently the location of their head office, McClarrons' dedicated team now has nationwide reach.

McClarrons provide a personal and professional service, tailored to their clients' individual needs, striving to always provide 'service without compromise'.

The challenge

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McClarrons set out to find a solution that would enable them to:

1. Effectively measure customer sentiment after having experienced a claim.
2. Internally assess employees on a 360º review basis, allowing McClarrons to better understand the performance of employees.

McClarrons wanted a system that was easy to manage, as well as being quick and easy for their clients and employees to interact with, whilst still delivering meaningful and rich insights through dynamic reporting.

McClarrons, prior to the project, were fulfilling these assessment tasks using a time-consuming blend of manual and digital (Word and Excel) processes to derive results in order to understand the dynamics of the business.

Karen Osborne – Chief Operating Officer and Emily Andrews – Head of Marketing, took responsibility for overseeing the project.

Finding the right partner

Karen and Emily's focus was on finding a cloud-based service provider with a cost-effective platform, which allowed for the effective measuring of McClarrons' marketing communications and human capital functions.

VirtlX was selected for the project.

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The solution

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Richard Chalk, Rison Software Managing Director comments:

“VirtlX Engagement Platform perfectly complements Karen and Emily’s requirements utilising two of the three elements available on VirtlX Perceive and Reflect.

“The Perceive element for monitoring customer experience (CX) and the Reflect element, with its Employee Satisfaction Index for assessing employee experience (EX) and its 360° Review for assessing employee performance (as seen by the assessed individual, the assigned manager and associated peers), delivers on their specified requirements.

“Our onboard bulk email system also assisted with the rapid-sending of emails to large sets of recipients, linking the relevant rated entities with the associated survey sets for assessment.”

Utilising the VirtlX model allowed the results to highlight areas in the business requiring attention, and to monitor how employees are progressing on a year-on-year basis.

The result

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McClarrons is easily able to monitor and assess dynamics in the business affecting their customers as well as their employees, and act where necessary to resolve issues before they escalate into real problems.

McClarrons was able to ensure their claims process was running to the best of its ability, immediately addressing issues raised by clients and improving upon the process to ensure similar issues do not present themselves in the future.

Employees' performance and business acumen was assessed allowing McClarrons to identify and address shortfalls in employees' skill sets, which in turn assisted in adding value back to their clients with a more dynamic, focused and professional team.

A noteworthy added bonus was a measurable reduction in business hours to perform the manual tasks and calculations that VirtIX accomplishes in a matter of minutes, which equated to a significant Pound Sterling value saved and that, in turn, allowed for the saved time to be better spent on other revenue-generating activities within McClarrons.

Karen comments:

"I have been extremely impressed with how Rison Software took the time to really understand what is important to our business, our people and most importantly our clients. They then were able to put forward proposals based on our needs. The solution provided through VirtIX will improve not just our efficiency; the data they will capture will help support the development of our people and enable us to measure and adjust one of our key moments of truth in our client journey."

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