



Business Insurance

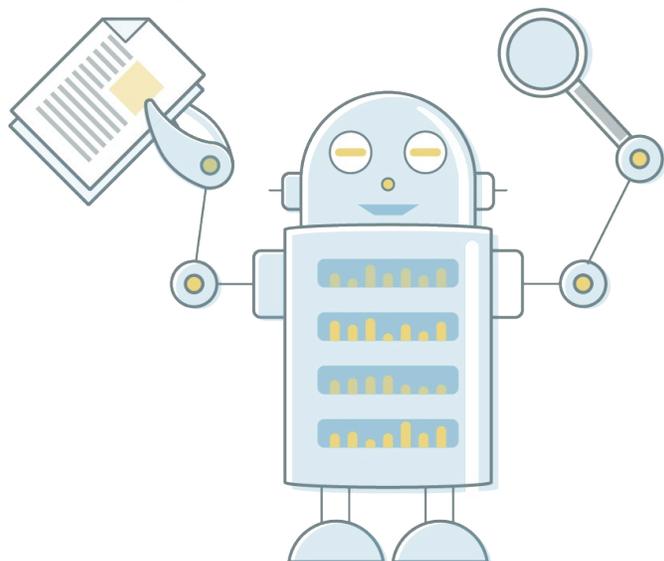
an easyDITA case study

Success in business often comes down to getting the right information into the right hands at the right time. This is especially true in sales, where providing quick, reliable answers to customer questions can make all the difference.

The Problem

For agents at Allstate Business Insurance (ABI), getting the information they needed to quote and issue complex business insurance products was a challenge. The answers were out there, but it was hard to find them when they were in front of a customer and needed help right away. As a result, their first option was to pick up the phone and talk to the support desk.

What the agents needed was an intelligent help system that understood the customer's current situation and could deliver relevant content at the point of need. Allstate Business Insurance worked with Earley & Associates and the easyDITA content management system to solve this complex information delivery problem in just four months.



The Need

At ABI, the policies and procedures that govern business insurance were published as PDF documents on the company's content management system. To find them, agents had to search for the correct PDF, then search again through the document for the information they needed. It was a time consuming, frustrating, and often fruitless process.

In order to get faster answers to their questions, agents called the sales and underwriting help desks. As business insurance policy sales grew, help desk volume grew with it, reaching over 2,000 calls per day at its peak. It quickly became clear that using the call center as a primary information delivery method was unsustainable and putting policy sales at risk.

The Solution

Earley & Associates helped Allstate develop a "search first" content strategy that began by asking, "What do agents need to know?" They analyzed the questions agents were asking the call center and then stored the answers in the easyDITA component content management system. Then, building on the rich capabilities of DITA XML, the team added keywords and

metadata that enabled easyDITA's built-in search engine to understand the context of the question and return targeted results.

Within just a few months the system was adopted as the agents' primary source of help, avoiding thousands of calls to the help center.

Implementation

Allstate and the team first identified the agents' most frequently asked questions, then searched through the policies and procedures PDFs to find the perfect answer and capture it in a DITA XML file of its own. That way, when someone searches for a specific piece of information, they find it.

The next step was to define a custom search experience for each question and optimize the answers for action. Using the information model built into DITA, answers were classified by "type." Step-by-step procedures were Tasks, the facts in look-up tables were Reference. That way, when an agent asks, "What is the SIC code for an Advertising Agency?" The search engine returns a table of relevant codes. If the question is "How do I do Quote and Issue a Commercial Auto Policy?", They get a step-by-step procedure.

Allstate reduced help desk calls by processing 25,000 calls a month with the Intelligent Assistant.

By designing a custom search experience for Allstate's agents, the the right information was delivered at the point of need.

Once the Intelligent Assistant was deployed, systems were put into place to analyze user behavior:

- Google Analytics tracks users as they move through the system, providing general usage information and a 10,000-foot view of activity in the help system.
- A feedback module allows users to leave comments and rate content, alerting the information developers if changes are needed.
- The easyDITA Search Testing Framework enables ABI information developers to proactively test search performance.

Now, instead of creating content and hoping it is found in search results, information developers create tests that prove the content is being delivered properly. Combined with search analytics, ABI information developers also quickly identify gaps in search responses and either tune the results to deliver the right information or create new content to fill the need. Proactive testing prevents any regressions in the intended search results. Information developers confidently deploy new content without worrying about the impact it will have on those results.

Today, a small team at Allstate Business Insurance maintains the system and makes continuous improvements. Business Users like Product Managers and Underwriters are able to update the information in easyDITA in real-time, and find ways of reusing content to boost efficiency and keep the documentation accurate and consistent. The call center, freed from answering the same questions over and over, now adds value by supporting the expansion of Allstate's business insurance products into new markets.