

HOW TRYG INSURANCE CONNECTS RED'S ANALYSIS, CRM, AND CUSTOMER DIALOGUE



From 250 different advisory methods to best practice, shared style, and training culture

- STARTING POINT**
- Tryg Business is already the preferred insurer for businesses
 - Best financial results and highest customer/employee satisfaction
 - Business leadership raises the bar with a new strategy and higher sales targets
 - Analysis (193 pages) by ReD uncovers latent customer needs and an open position

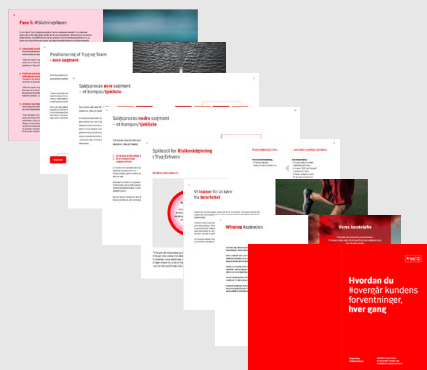
- CHALLENGE**
- Double-digit million investments in a new IT system (ROI required)
 - Large potential for additional sales (SoW) (+100M DKK)
 - Winning Aspiration (WA) interpreted in approximately 250 different ways
 - Customers request proactive advice, business understanding, simply add/drop options, and better timing
 - Requires conversation structure and skills (transitions, questioning techniques)
 - Four different IT systems being merged into one (~CRM)

- PROCESS**
- Gap analysis (Deep Dive, interviews, call monitoring, observations, etc.)
 - Co-labs developing training kits for 6 sales channels
 - Reporting to business leadership and each sales director/channel
 - Train-the-trainer for 20 sales directors/partner managers/sales managers
 - Steering group with CM team (input for e-learning, KPIs, roadmap)
 - Design of new sales process for upper/lower segment
 - Video recordings with testimonials from management to business leadership

- RESULT**
- Gap analysis reveals 3 barriers for anchoring and lasting training impact
 - Best practice in risk advisory behavior described for 6 sales channels
 - Sales tool/kit for 20 trainers across in/outbound, partner, SME, and LA
 - Consistency between sales potential, positioning, customer needs, and behavior

- TIPPING POINTS**
- Strategic alignment at all management levels
 - Business leadership's courage to follow gap analysis recommendations
 - Consistency in advisory behavior and feedback culture
 - Strong project management by the program director and Change team

FINAL DELIVERABLES



“*Incredible how much can be gained from structure, and we've created a real training culture, where everyone practices 'little but often' in the shared style... We had huge reservations initially, but now everyone sees the value.*”

Claus Thaarup Mikkelse
Change Consultant, Tryg Business