



Collab.



Fidelidade Group

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FIDELIDADE

SEGUROS DESDE 1808

About Fidelidade Group

Fidelidade is the **leading insurance company** in **Portugal**, including life and non-life areas.

The company operates in various insurance business segments, is present in several countries besides Portugal and concluded the year 2014 with a market share of 27.7%.

Its more than **2 million clients** and an **award collection** of **4 billion euros** reflect the Company's commitment with future, focused on **customer satisfaction** through **new products**, **high service levels**, **entrepreneurship support**, **environmental concerns** and **promotion of greater financial literacy**.

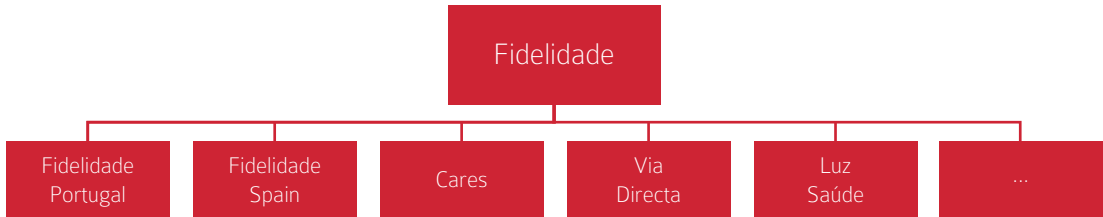
Regarding new products, in 2014, were launched **innovative solutions**, such as the coverage of Driver's Vital Protection or the Self-Esteem Plan, which materializes the Company's positioning in customer service matters and simultaneously translate a **sustainability** philosophy inherent to insurance activity.

Fidelidade is the most **awarded insurance enterprise in Portugal**, having won Most Trusted Brand in 2014, Marktest Reputation Index 2014 and Marketeer Awards – Insurance Company 2014.

Internationally, Fidelidade was distinguished by Efma Accenture Innovation Awards in "sustainable business" category with the project WeCare. This aims supporting the proper reintegration of people who have been victims of serious accidents and have physical, economic and social difficulties in reintegrating themselves.

In 2014 the Fosun Group acquired a major stake in the Company and, in end of the year, the shareholder structure was: Longrun Portugal, SGPS, SA, with 80%; Caixa Seguros e Saúde SA, with 19.99%; and company employees, with 0.01%.

- Operates since 1808 in insurance sector
- Leader in Portuguese insurance market
- Operates in 7 countries and in 3 continents (Spain, France, Luxembourg, Macau, Angola, Cape Verde and Mozambique).
- 2 million customers
- With around 350 agents in Fidelidade and approximately 700 in all Group (Fidelidade Portugal and Spain, Cares, Via Directa, Luz)



The Evolution of Customer Service

The consolidation of the new **brand Fidelidade** allowed an increase of the Company **awareness** and had also a significant impact on sales network, mainly due to the **new design** in the attendance areas and to the **renewed communication strategy** caused by the brand **unification**.

The main action lines continued focused on developing the relationship with the commercial networks, in conceiving products regarding **customer's needs**, in increasing organizational efficiency, and in implementing the Social Duty program.

The insurance sector of Fidelidade Group operates globally selling products of all insurance lines, as part of a **multi-brand** and **multi-channel strategy**: agencies; connected mediators; agents; brokers; banks (CGD); post office presence (CTT); internet and telephone channel.

The Integration of Non Physical channels

Currently there are several communication channels and consumers choose according to their preferences and needs, the most suitable for them. This concept of **multi-channel** can be illustrated by the following example: to search for information the client uses the website of the insurance company, but to claim chooses the telephone. Fidelidade besides offering different communication options, (agencies, mediators, telephone, website, e-mail, etc.), guarantees at all, the same service standard and informative content. This **Omni-channel** management is extended to the contact center, where the use of a **unified communication platform** allows the same user experience in all channels.



With **OneContact** solution, Fidelidade can manage communications across voice, video, e-mail, instant messaging and social networks, according to the needs of a more flexible, scalable and profitable contact center.

In this **project** has always been present the perception that an individual customer does not have necessarily a preferred channel approach, but a **combination of interactions**. For Fidelidade this means supporting any communication channel that the customer wants to use and also provide their contact center agents with a **unified front-end** that allows to view all customers' interactions and history in **one** single application.

Present



Voice



Email



Chat



Skype



Facebook



Twitter



MS Lync



Video



Mobile
Apps

Future

OneContact Solution

OneContact SIP standard architecture allowed implementing a more **cost effective contact center**. It is **100% multi-tenant** and **web**. Access can be made via a simple browser and agents can work from anywhere through WebRTC technology;

- **OneAgent Windows or Web** - Available on a web browser (WebRTC) or desktop. It requires no installation, includes softphone, multi-session and agent scripting. In both versions, agents can simultaneously interact with multiple communication channels, websites, knowledge bases, CRM solutions, tickets, etc.;
- **Unified Front-end** - Agents can handle customers' interactions in a complete and easy way. They can access quickly all the customer and business information in a single application. There is no need to waste time into several applications. This allows to improve the agent's performance and provide a more effective customer service.
- **OneSupervisor** - Is the perfect tool for contact centre supervision. It works as a **monitoring and configuration tool for the contact center** with its own advanced Business Intelligence reporting system;
- **Customer Interaction Hub** - Multichannel contact management system, which allows to create and maintain a clear view of the profile and history for every client. Runs inside OneAgent and automatically records all contacts, whether Inbound or Outbound, continuously maintaining the contact's history and context, regardless of the channel or time frame between interactions. The purpose of CIH is to allow the agent to resume a conversation with a client while having access to the total context of previous interactions, whether they happened by voice, video, email, chat, social networks, or other channels.
- **OneQualityMonitoring** - It is possible to save voice and screen recordings and then analyse agents' activities (individually or in teams), in multiple channels, according to predefined skills for each service. The skills adjustments can be made in real-time and if necessary the platform allows to select agents for training and then evaluate their performance. In case there is a need to improve certain areas, e-Learning modules can be displayed;
- **OneWorkforce** - Offers contact centers a complete, web-based, workforce management suite. It is divided into several modules that together include all WFM requirements from historic data analysis and forecasting, to staff and schedule generation, as well as real-time monitoring and reporting. In addition, OneWorkForce provides an experimental area in which multiple hypothetical "what-if" scenarios can be tested and their impacts immediately analysed.



"Collab is always ready to develop the best solution to solve our problem. Collaborates actively in identifying the issues and always recommends the best and not the easiest solution for us."

Miguel Vilaça, Contact Center Director



Success Factors

- **Multichannel Platform** allows to handle inbound and outbound voice, email and back-office tasks in a single front-end, with agent productivity increase.
- **Integration** cwith Fidelidade applications (CRM, production and claims)
- Tailor made **IVRs** and **Wallboards**
- **Agile Reporting** (media interactions historic, real-time reports, OLAP cubes)
- **Flexibility** in adapting to Fidelidade requirements
- **Multi-session** in Omni-channel management

Contact us for more information

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