



A program with demonstrated success for insurance company call centers.

The Key to Your Success

It's no secret that leaders seek out other leaders for advice. When top insurance companies around the globe need independent perspective on business trends, a corporate technology vision, assessment of technology alternatives, and hands-on guidance on project priorities and management, they call the management consultants at CTS-Consulting.

For more information, please call or email:

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CTS-Consulting

Providing professional services to the financial services industry with an emphasis on the use of information technology as a competitive resource

Mission

Sustain the competitive financial services marketplace by providing planning services and solutions to industry stakeholders

Testimonials

We engaged CTS/AMS to help us develop a customer optimization channel to cross sell and upsell current policyholders. CTS/AMS was instrumental in helping us to set up the project for success and executing the project for two years. Their strong expertise in call center based selling as well as their hands on, supportive approach gave us the skills, knowledge and confidence to be successful. With CTS/AMS' help, we achieved our goals for the program. I would recommend Pat, Sue and the CTS/AMS team to anyone looking to implement a similar initiative. They are great consultants and outstanding partners to their clients.

*VP, Marketing and Sales Development,
Life Insurance Company*

We chose CTS consultants to support the development of our strategic plan. CTS helped us align our business processes, information technology and organization to support our business direction.

President, P&C Company

CTS-Consulting

THE CUSTOMER OPTIMIZATION PROGRAM

ADDITIONAL REVENUE



IMPROVED SERVICE

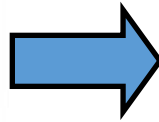


**FOR
LIFE & HEALTH
PROPERTY & CASUALTY
EMPLOYEE BENEFIT
INSURANCE COMPANIES**

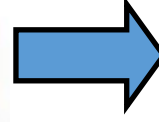
WWW.CTS-CONSULTING.COM



Marketing Strategy



Training and Coaching



Tracking, Monitoring, Reviewing

Enhance your call center – deliver superior service, optimize valued relationships AND generate revenue.

What we deliver

A multidisciplinary team of experienced professionals equipped to transform your insurance call center from a **Cost Center** to a **Revenue Center!**

Framework

We understand every call center has unique requirements and objectives, we offer custom solutions by following a phased individualized approach which includes:

▶ **Assessment / Solution Phase**

Comprehensive review of current approach to customer care (processes, product mix, corporate culture and customer demographics):

- Metrics developed to establish baseline
- Skill/knowledge gaps identified
- Revenue potential identified

▶ **Development / Implementation Phase**

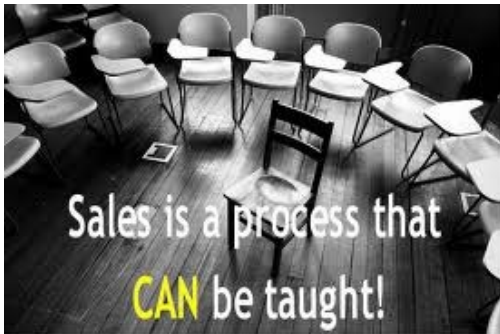
Design and deliver implementation plan, then “hold your hand” throughout the entire process.

- Resource and support requirements established
- IT solutions presented
- Customized training program delivered
- Cost/benefit pro forma prepared

▶ **Measurement Phase**

Oversight throughout the measurement phase.

- Monitor progress
- Review statistical data
- Make recommendations
- Adapt, make modifications
- Summarize the overall initiative



With our comprehensive **Customer Optimization Program**, we'll give you the tools and training you need to transform the way you do business!