Vitality

CASE STUDY

How Vitality leverages Voice of the Customer to help members better their lives

2021 Customer Experience (CX) Team of the year, winning Gold

160,000+ responses to digital feedback forms were successfully collected, monitored and analysed

'Positive resolution' in the car insurance business increased by 53 percent in less than 12 months

Self-service usage has increased by 14.6%

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Vitality's feedback programme, powered by Medallia, supports our teams to actively take action on our customer needs – improving both customer & employee wellbeing.

Tammy Lowth
Head of Customer Research and Insights

Medallia

SUMMARY

With its aim to help people live healthy and active lives, Vitality wanted to better understand their customers so that they could convert that data into effective, consistent business actions.

The voice of the customer was accessible to – and understood by – personnel ranging from executives to customer service advisors, enabling Vitality to react proactively to the changing needs of their clients.

This was particularly useful during the pandemic as the company was empowered to rapidly re-configure its business strategy and plans to better assist both individual and corporate clients coping with the pandemic's effects.

This approach has enhanced the company's experience with its customers – enabling the company to win multiple customer service awards, such as winning Gold in the 2021 UK Customer Experience awards for CX Team of the Year.

Enhancing the Customer Experience

Vitality is a £92 million ($120.5 million) health, life and car insurance provider in the UK that aims to help people to live healthy and active lives.

To continue to improve member experiences, Vitality recognised the value of improving the way it collected customer feedback – moving from numerous individual feedback responses to a system that can categorise and order feedback. In 2020, they launched Medallia's world-class platform and established a dedicated team of customer experience (CX) professionals to drive the Voice of the Customer (VoC) throughout the company.

Faced with the pandemic, Vitality identified the opportunity to leverage Medallia's ad hoc research capabilities to support the business. The team used this to gain valuable insights into the changing thoughts and behaviours of customers, which became a key navigator in how they adapted their business approach. Recognising this early on meant that they were able to deliver their first research piece within the first month of implementation. Examples include:

- Understanding the wellbeing of their members and staff shortly after the first lockdown which helped inform their own employee health & wellbeing strategy
- Gaining insights into views and concerns around receiving treatment in the pandemic
- Providing their corporate clients with a temperature check of the wellbeing of their employees with an output of tailored recommendations

Some of the insights collected were that individual customers were motivated through programmes like "Get Healthy, Get Rewarded" to improve their lives through exercise, stress-relieving relaxation exercises and by following sensible eating and drinking habits.

Adapting Strategy To Address Rapidly Changing Business Needs

A key benefit of implementing Medallia was that it supported Vitality's desire to respond effectively in a dynamic, shifting business environment. Self-service capabilities helped the CX team roll out bespoke dashboards within two days of launching, helping to put insights into business leaders' hands immediately.

Business leaders at all levels across the separate lines of business (Health, Life and Car) could collect consistent data from multiple touch points (Contact Centre, research surveys, etc.) and rapidly update business plans on the fly to meet rapidly changing customer requirements, including:

- Research using the platform helped Vitality further understand why some members were having challenges around earning Vitality points and their preferred exercises and fitness devices and apps. Enabling the programme to be adapted where possible to continue to engage customers and reward them for making positive health changes

- Surveying customers to better understand their future preferences in preparation for the easing of a disruptive lockdown.

- Research which gave Vitality the opportunity to provide tailored communications and advice to help drive behavioural change following member's health checks.

- Surveys of corporate customers enabled business clients to better appreciate how their staff were coping with health issues, enabling them to better understand and support their employees.

This flexibility proved particularly valuable during the pandemic. According to Vitality's head of customer research and insights, Tammy Lowth, "We quickly pivoted to train and launch virtually in March 2020, then crucially shape our roadmap around and adapt to new pandemic needs versus original plans."

Coaching sessions and processes based on customer feedback and surveys were put in place in the contact centre and customer feedback on agent's tone and style helped managers identify what worked and what didn't, improving their ability to coach customer-facing agents. This enabled employees, ranging from senior management to customer service and support representatives, to deliver an improved customer experience.

Delivering On The Mission

Vitality's push for a consistent, integrated, real-time, role-based customer insight platform has transformed its ability to achieve its vision of: "Proactively helping people better their lives."

Implementing Medallia and pushing its self-service capabilities out across multiple lines of business supported the company to achieve a unified, enterprise-wide view of its customers, and, even more important, transformed its ability to directly respond to their needs as they evolved. Medallia users, ranging from executives to customer service advisors, were empowered to respond to customer inquiries and proactively reach out to 6,000 customers while simultaneously monitoring and analysing more than 160,000 responses to digital surveys, allowing them to prioritise improvement opportunities within the digital channels and across the organisation. In Vitality's car insurance business, 'positive resolution' increased by 53 percent in less than 12 months while several key 'ease of business' metrics also saw significant improvement.

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About Us

Medallia is the pioneer and market leader in Experience Management. Medallia's award-winning SaaS platform, the Medallia Experience Cloud, leads the market in the understanding and management of experience for customers, employees and citizens. Using Medallia customers can reduce churn, turn detractors into promoters and buyers and create in-the-moment cross-sell and up-sell opportunities, enabling clear returns on investment. Medallia.com

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