Case Study

The Standard Moves from Static to Dynamic with Enlighten Autopilot

The Standard has provided insurance, retirement products, and investment services for customers since 1906 for both B2C and B2B customers. Over the last few years, The Standard has undergone continuous digital transformation that added new layers of technology and complexity to the contact center's operations. The Standard set out to find a strategic partner and platform to provide a holistic solution, and chose NICE CXone as its new contact center platform. Ross and her team worked with NICE Value Realization Services to maximize the investment in the capabilities offered. NICE Workforce Management, Quality Management, Interaction Analytics, and Feedback Management were all important in the initial rollout. However, one star player was Enlighten Autopilot.

40%+
Response rate to post-call feedback

40%
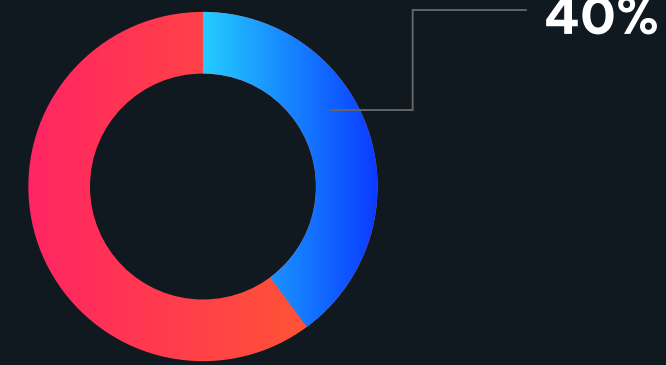
OVER ONE MILLION
Interactions a year

4.6 / 92%
Customer satisfaction score

4.8 / 96%
Customer effort score

CUSTOMER PROFILE

ABOUT
The Standard is dedicated to helping customers achieve financial well-being and peace of mind. In business since 1906, The Standard is a leading provider of financial protection products and services for employers and individuals. Products include group and individual disability insurance, group life and accidental death and dismemberment insurance, group dental and group vision insurance, voluntary and supplemental benefits, absence management and paid family leave services, retirement plan products and services, and individual annuities.

INDUSTRY
Insurance/financial services

WEBSITE
www.standard.com

LOCATION
Headquartered in Portland, OR

SIZE
600 employees

GOALS
- Modernize technology stack
- Improve agent and customer experience
- Reduce complexity
- Improve operational efficiencies

PRODUCTS
- Enlighten Autopilot
- NICE CXone
- NICE Workforce Management
- NICE Value Realization Services
- CXone Feedback Management
- Interaction Analytics
- Quality Management

FEATURES
- AI-enabled interactions
- Smart self-service options
- Dynamic IVR

01 THE BEFORE

Too much tech complexity

With a diverse product portfolio and thousands of customers to support, The Standard's contact center is constantly evolving and upleveling. Questions around finances and insurance can be complex or simple but frequently involve emotion and personal details. Sarah Ross, Senior Director of the contact center at The Standard, said that her team focuses on "ease, empathy and expertise" to best serve their customers.

Over the last few years, The Standard has undergone continuous digital transformation. While this process had positive effects, it also added new layers of technology and complexity to the contact center's operations. The Standard needed a strategy and platform that would provide a solid foundation and enable innovation and transformation for its operations and customer experience.

02 DESIRE TO CHANGE

Disconnected customer journeys and mounting customer pressure

Customers today are always connected, and they expect to be able to reach you wherever they are, versus where your organization is. "Market and customer pressure continue to intensify as companies continue to increase focus on and investment in customer experience improvements," Ross said. As Ross and her team reviewed the state of the contact center over the last few years, several pain points and blocks were uncovered:

- The customer journey was disconnected.
- Customers lacked self-service capabilities.
- The contact center had limited access to customer insights.
- Increased product complexity was creating knowledge gaps.

Ross said what makes The Standard different from competitors is "our people and deep expertise." With these challenges, the contact center struggled to leverage those differentiators. Ross and her team began a search for a platform that would help reduce complexity while also upleveling capabilities.

03 THE SOLUTION

Moving to a leading-edge IVR

The Standard chose NICE CXone as their new contact center platform and worked with NICE Value Realization Services to maximize the investment in the capabilities offered. NICE Workforce Management, Quality Management, Interaction Analytics, and Feedback Management were all important in the initial rollout. However, Enlighten Autopilot (formerly SmartAssist) was a star player. "We hadn't significantly updated our IVR in over 10 years and we moved from a more static IVR to conversational AI with Enlighten Autopilot," Ross said.

Initially, there was a hefty learning curve for both the contact center and external customers. After more than a decade of little change in this functionality, Autopilot opened a new world of opportunities. Leaning on assistance from VRS, The Standard created a gradual rollout that focused on moving to the new IVR and laying the foundation for future transformation. Post-call and IVR surveys were updated to reflect the changes and questions were realigned around what digital capabilities customers want, unlocking insights that are helping drive decisions around investments and how to drive more self-service.

04 THE RESULTS

From static to dynamic

Given how long it had been since a major upgrade, this effort created an opportunity for The Standard to gain a shared understanding from both a business and technology perspective about how the IVR was performing and the results it was or wasn't delivering. Once Autopilot was implemented, the contact center had new functionalities and data to work with. This included new trackable metrics involving containment rate and sentiment via CXone Feedback Management. The IVR and post-call feedback now average a 40% response rate and provide actionable insights for

NICE

adjusting ongoing strategy.

New dashboards help the team monitor performance, identify issues, and solve problems in real-time.x Architecture, data, and platform integrations have been important to The Standard's success with Enlighten Autopilot. Working with VRS, the contact center received recommendations on organizational structure, agent scheduling options, hiring profiles, and metric standardization to realign metrics and priorities around the insight Enlighten provides.

"Now we have a solid foundation and are able to continuously improve and enhance the technology," Ross said. "We've established new roles and governance to track performance, proactively identify issues, and highlight opportunities for improved CX."

05 THE FUTURE

The contact center as a strategy enabler

With Enlighten in place, Ross is looking to make further adjustments and eventually implement additional features. A key goal is to continue to improve the containment rate. The Standard is also reviewing opportunities to further drive self-service in the IVR and integrate it into the organization's overall digital adoption strategy. Value will be a central focus in the years to come, and Ross aims to position the contact center as a value center and strategy enabler to senior leadership instead of a "cost center." As AI becomes more prevalent, Ross sees an opportunity to create meaningful experiences for employees and customers with brand-safe solutions like Enlighten.

"Enlighten Autopilot is **one of the most significant customer facing AI capabilities** we have rolled out."

SARAH ROSS
SENIOR DIRECTOR
OF THE CONTACT CENTER
THE STANDARD
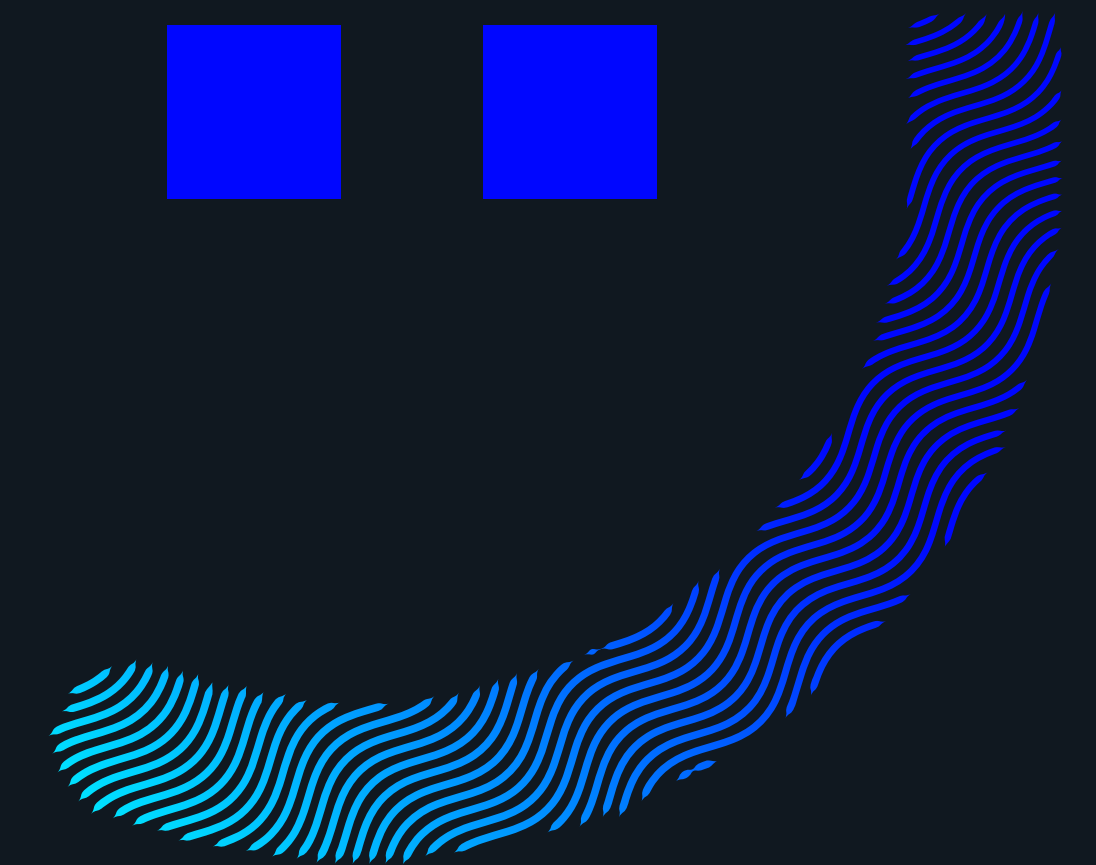
About NICE

With NICE (Nasdaq: NICE), it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center—and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

www.nice.com

NICE