

DS Benefits Increases Retention and Overall Life-time Value Using CX Application



Challenge

- Better understand how DS Benefits rank vs. others in their market
- Put a number to the value their clients associate with their services
- Gain a better understanding of growth opportunities and customers at risk for churn
- The ability to accurately measure individual buying values and motivators
- Company-wide desire to understand what's necessary to maintain and grow their best-in-class ranking

Findings

- Limited visibility into cross-sell and up-sell opportunities
- Blind spots identified where they may be overestimating their value
- Tailor services to clients based on what *they* value most

Approach

- Implement patented methodologies to better understand client perception
- Increase retention and overall customer life-time value
- Reduce percentage of Transactional & Antagonistic responses year over year
- Identify the unique motivators and values associated with each client

Success

- Yielded a 57% response rate to survey
- Hit revenue target first year
- Developed strategies to address buyer motivation

Encompass-CX's Customer Experience Management application helps DS Benefits increase retention and overall customer life-time value.

DS Benefits, a Human Capital firm specializing in Group Benefits and Organizational Development, partners closely with clients to provide innovative, customized insurance brokerage/consulting services: government regulations and compliance, strategic planning, benefit design, and financial analysis and forecasting. With a strong emphasis on group, individual, financial and retirement benefits, DS Benefits provides clients the insight and knowledge to navigate the new era of government regulations brought on by the Affordable Care Act and stricter government compliance across all employee benefits.



"Implementing a client feedback tool has allowed us to focus energy and resources on maintaining brand equity within our existing customer base

while establishing ourselves as an industry leader in what is a very competitive market," said Mike Rao. "Our clients are more aware of our commitment to them and the services we provide. The feedback we receive also allows us to take action and successfully onboard new clients."

Mike Rao
Principal

The HR Group, A DS Benefits Company

About Encompass-CX

Encompass-CX offers a scalable software application that collects, measures and distributes customer data and provides clarity into all aspects of a company's accounts, products and service teams making it easier for businesses to gain real-time visibility into revenue, renewals and retention.

Learn More About Our CX Application

Our application features highly-customizable assessments, individual and organizational reporting, and a real-time action-planning engine.

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