



ACCOUNT RETENTION AUTOMATION

Assess account and broker sentiment, significantly improve your ability to retain customers, increase recurring revenue, and maximize customer lifetime value.



Did you know...**most Health Plans spend 5-10X more on marketing and sales as compared to retention**, and **less than 5% of companies systematically check the pulse of their accounts and brokers**.

We know the adage **“it’s cheaper to keep a client then acquire a new one”**, but Health Plans spend far more time and money on prospecting new accounts versus retaining current accounts, when a mere **3-5% increase in retention can have a significant impact on net income**.

THE PROBLEM:

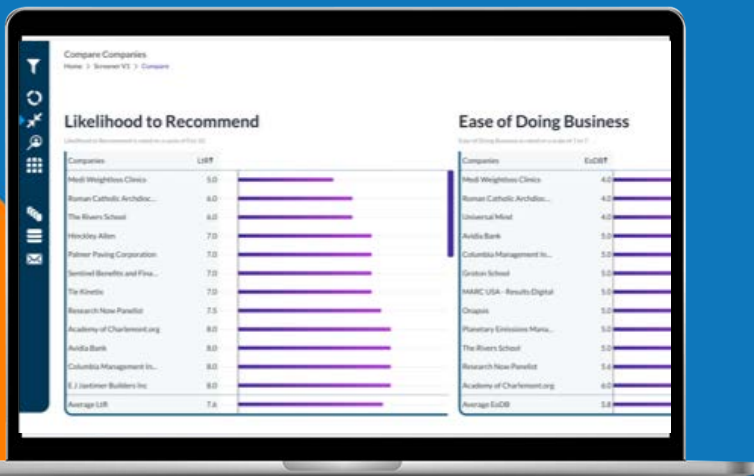
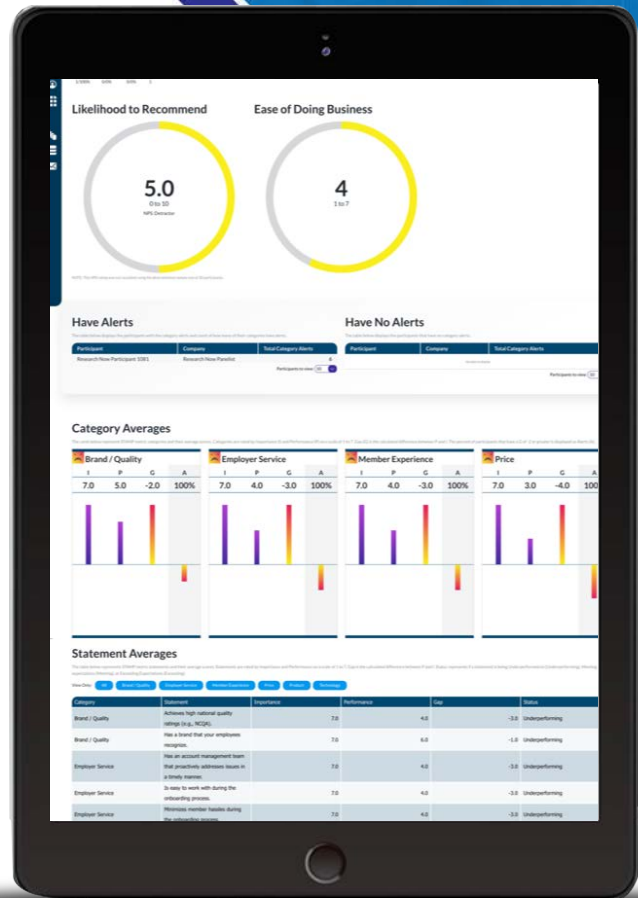
- ◆ Health Plans usually spend the most time on their largest accounts or the ones that make the most noise, ignoring the rest. Most are leaky buckets trying to acquire new accounts to outpace the loss of current ones.
- ◆ Many Health Plans rely on sales and account manager self-reported input in to CRM systems; data is usually biased and inconsistent.
- ◆ Traditional surveys are sometimes used; however, these are not consistently deployed, provide results at the summary level (not client-by-client), and are time consuming and expensive.
- ◆ Health Plans look for an easy path like measuring Net Promoter Score (NPS). NPS is not a good predictor of group or broker sentiment.

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STAMP HELPS YOU SYSTEMATICALLY:

- ◆ Determine what is most important to accounts and brokers
- ◆ Measure performance against importance/expectation
- ◆ Provide real time alerts on under performance against account expectations
- ◆ Identify key playbook actions to improve account sentiment and retain clients
- ◆ Track trends over time with benchmarking against peers
- ◆ Integrate additional company data, fueling predictive analytics and continuous learning
- ◆ Synchronize with existing Sales & Marketing Automation Platforms



- ◆ STAMP allows you to view results on multiple levels, starting at the individual level and rolls up to the company, account management and segment level.
- ◆ STAMPing clients is an iterative process. Connect with clients months before their renewal so you can address any issues and take the action required to retain at-risk clients.

Getting STAMP up and running only takes a few hours of effort. Your time is spent interacting with your client, not administering the STAMP platform.