Sun Life Canada's New Customer Experience Package

New customers that sign up for Sun Life Canada's personal life insurance policy should be made to feel welcome and have the assurance that Sun Life is with them all the way, right from the start. We aim to achieve this by utilizing a combination of touchpoints that are directed toward the new customer within the first 4 months of their initial purchase of their life insurance package. Touchpoints for the New Customer Experience Package include:

- A New Client Welcome Package
- An Online Services Demonstration
- An Account Set-Up Checklist
- A 60-Day Client Check-In
- and a 120-Day Follow-Up/Review

New Client Welcome Package

A physical Client Welcome Package will be provided to the customer on the day of their initial sign-up and will consist of resources and tools to help them understand the life insurance process, as well as contact information with emails and phone numbers for the appropriate Sun Life advisors/departments. The package will also contain a welcome letter for the client, expressing Sun Life's gratitude for their business and offering the client a more personal touch, signed by Sun Life Canada's President Jacques Goulet. Lastly, the welcome package will contain information on further products and services that are offered by Sun Life Financial, again providing appropriate contact information under each offering to encourage contact through convenience. The New Client Welcome Package should ease any customer uncertainty around the life insurance process and offer them reassurance that they are in the right hands with Sun Life.

Online Services Demonstration

A demonstration of the online services that are offered by Sun Life Financial, specifically focusing on services directly relating to their life insurance policy while also highlighting the additional features that are available to the client as well, such as the range of Sun Life's insurance offerings (health, travel, mortgage protection, family, workplace, business). This can be done either virtually, over the phone, or in-person, depending on client preference and availability. It can be booked at a time that works best for the client, encouraging completion within the first 30 days of their sign-up. The demonstration will walk the client through Sun Life's products, tools and resources, support, finding quotes, and finding an advisor. The demonstration is designed to introduce the customer to the online platform and get them comfortable with navigating the site efficiently and encourages further exploration of the site, leading to discovery of additional Sun Life products and services that suit their needs. For customers that need additional assistance, it's vital that our advisors and customer service be fully trained and proficient with teaching users the site and must be patient and able to communicate clearly in order to maintain positive client-relations.

Account Set-Up Checklist

Once the Online Services Demonstration has been completed, the next step in the process is to implement an Account Set-Up Checklist for the client. This can again be done either virtually from the client's home or in-person at a Sun Life branch, depending on the needs and preferences of the customer. The Account Set-Up Checklist will be an online feature that takes the user through the account set-up step-by-step, starting with creating their profile and leading them through required fields and ensuring the account use is maximized to its full potential. If the user is not comfortable with this online process, they are able to book in to have an advisor direct them through it either in-person or over the phone.

60-Day Check-In

After 60 days from the client's sign-up, an advisor will reach out to the client to do a brief check-in. Questions asked will include whether they have been satisfied with the service so far, if they have purchased any further products from Sun Life, and if there are any questions or concerns that haven't been addressed yet. The check-in request should come as a personalized email from their advisor asking when they would have time to schedule a quick phone call. During the call, the advisor asks questions from the questionnaire to determine overall satisfaction or where potential improvements could be made. If a phone call is not possible, an email containing the questionnaire may be used instead, although a call is recommended and should be encouraged in order to build personal connections with the client. This aims to ensure that the client is satisfied overall with the product and caters to any specific needs that may be mentioned in the process. The provides Sun Life the opportunity to supplement any potential short-comings and improve client satisfaction where needed.

120-Day Review

Once the client has passed the 120-day mark from their initial sign-up, a review will be sent to the customer in the form of an email. The review will provide the customer an opportunity to rate the product and service that they have received so far, voice any questions, comments, or concerns that they might have, and lets the customer know that Sun Life is still there and still cares. The review will consist of a survey and questionnaire that allows the client to communicate what they liked or didn't like about the process, what they would like to see improved or built upon, and keeps Sun Life in the client's mind, encouraging customer loyalty through Sun Life's understanding and direct action on client feedback.

References

Insurance. Sun Life. (n.d.). Retrieved November 19, 2022, from https://www.sunlife.ca/en/explore-products/insurance/

Norriss, A. (2022, April 28). *Client welcome pack template for service providers*. AN Virtual Services. Retrieved November 19, 2022, from https://www.anvirtualservices.com/blog/client-welcome-pack