

<b>Checklist to Capture the Impact on End-Customers/External Clients</b>		
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Purpose: Provide a snapshot of the impact of a major program, especially those that involves the implementation of new software platforms or systems, on each end-customers/external clients.		
<p>The features, functionality, and capabilities that the major program implementation includes will have a positive impact on this specific End-Customer Business Outcome or Result measure</p>	<p><b>The Major Program Implementation will have positive impact on this measure (Y/N)?</b></p>	<p><b>The Positive Impact of the Major Program on this specific measure has been included in a List of Positive Benefits and has been communicated to the End-Customers/External Clients (Y/N)?</b></p>
<p><b>A. Policyholder Satisfaction:</b></p>		
<p>1. Overall Policyholder Satisfaction</p>		
<p>2. End to End (E2E) Customer Journey (Time to Fulfill Request) by Product, and by Type of Service (New Business, Policyholder Services, Claims, etc.)</p>		
<p>3. Average Handling Time</p>		
<p>4. First Call Resolution</p>		
<p>5. Abandoned/Dropped Calls</p>		
<p>6. Additional Quality Measures (e.g. based on surveys per call)</p>		

7. Net Promoter Score (Policyholder NPS)		
<b>B. Policyholder Statements, Correspondence, Prospectus, Information and Reports:</b>		
1. There are New Statements, or Correspondences, or Prospectus, or Information or Reports that will be sent to Policyholders as part of implementing the major program and the quality and timeliness of these will improve the Customer Experience measures		
2. Total time to produce the information the item above will meet or exceed existing total time measure		
<b>C. Policyholder Self-service Capabilities:</b>		
1. The Self-Service capabilities will improve Customer Experience measures		
2. Systems Availability for Self-service Capabilities will be increased by this major program implementation		
<b>D. Agents, Brokers, Wealth/Retirement Advisors Satisfaction:</b>		
1. Overall Agent, Broker, Advisor Satisfaction		
2. Ease of Doing business with Insurer and/or Insurer's TPA		
a. Licensing		
b. Commissions		
b.1 Agency Payments Accuracy (%)		
b.2 Agency Payments Timeliness		
c. Products (Descriptions) and Launch Support		
d. Systems and Automation support		
e. Information and Data Support (including Self-service)		
3. Average Handling Time		
4. First Call Resolution		
5. Abandoned/Dropped Calls		
6. Additional Quality Measures (e.g. based on surveys per call)		
7. Net Promoter Score (Agents, Brokers, Advisors NPS)		

<b>E. Agents Statements (e.g. commissions reports, licensing status), Correspondence, Product Information, and Reports:</b>		
1. There are New Statements, or Correspondences, Product Information or Reports that will be sent to Agents, Brokers and Wealth Advisors as part of implementing the major program and the quality and timeliness of these will improve the Customer Experience measures		
2. Total time to produce the information item will meet or exceed existing total time measure		
<b>F. Agent/Broker/Advisor Self-service Capabilities:</b>		
1. The Self-Service capabilities will improve Agent/Broker/Advisor Experience measures		
2. Systems Availability for Self-service Capabilities will be increased by this major program implementation		
<b>End of the Checklist for End-Customers</b>		
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