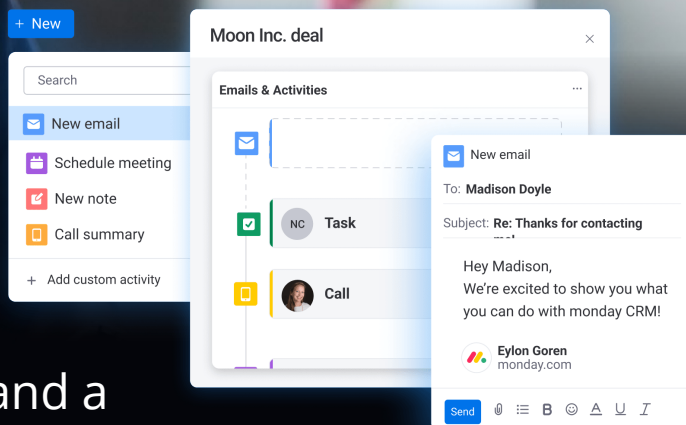


Client Services Excellence

Delivering Faster Service and a 96 NPS with monday.com



THE CHALLENGE

Client service teams often struggle with disconnected systems, manual reminders, and inconsistent follow-up processes.

Everything.Insure wanted to create a more proactive and efficient client service function.

THE SOLUTION

By implementing automations, reminders, SLA tracking, and centralized reporting within monday.com, the team created a more consistent client experience.

RESULTS AT A GLANCE

40% Improvement in Operational Efficiency

The client service team consolidated multiple reporting sources into a single platform.

96 NPS Score

The business now reports an exceptional:

Net Promoter Score (NPS) of 96.

Fewer Client Complaints

Improved communication workflows have significantly reduced service-related complaints.

Better Visibility

Teams can now identify:

- Service bottlenecks
- Escalation trends
- SLA compliance
- Delivery time performance

CLIENT SERVICES PERSPECTIVE

"The system now does all the thinking and doesn't forget anything."

KEY OUTCOME

Centralized visibility and automation have enabled the team to deliver a more consistent and responsive customer experience.

Customer requests						
Open requests						
	Description	Created on	Priority	Status	Files	Type
Rebranding	We want to launch our...	Mar 4	Medium	New		Suggest improve
Homepage design	Redesign the homepage...	Nov 6	High	New		Other question
Working on it						
	Description	Created on	Priority	Status	Files	Type
Retargeting campaign	We want to run a new...	Sep 24	Low	Waiting for approval		Other question
Social media engagement	We want to increase our...	Nov 6	High	Working on it		Other question
Done						
	Description	Created on	Priority	Status	Files	Type
Communications plan	We want to plan upcom...	Oct 13	Low	Done		Suggest improve
I didn't get the right invoice	I think there has been a...	Nov 6	High	Done		Billing question

PARTNER SPOTLIGHT: Why Everything.Insure Chose The CRM Team

Technology alone does not drive transformation. Successful adoption depends on having the right implementation and support partner.

For Everything.Insure, The CRM Team played a key role in ensuring ongoing support and optimization.

"To be honest, if I ever need anything, Jarad is always available. I recently added another group company to their own monday.com instance and it was immediately added to my profile so I could oversee everything. They are quick, efficient, and always willing to help."

PARTNERSHIP IMPACT

- Responsive support
- Rapid implementation assistance
- Ongoing optimization guidance
- Multi-company scalability
- Trusted strategic partnership

CLOSING RECOMMENDATION

"Just do it, you won't regret it. If you put in the effort to scope out your requirements correctly before implementation, you will save yourself a lot of time down the line as the system is extremely easy to use and setup."

Tyne van der Merwe

HEAD OF SALES AND DATA ANALYTICS

Everything.Insure