



MEERA.ai

COMPASS
INSURANCE ADVISORS™

Case Study

Compass Insurance automates
the entire policy renewal cycle
with Meera





About

Compass Insurance Advisors is on a mission to make shopping for insurance simple, efficient, and easy to understand.

The company takes a client-centric approach by providing individualized support every step of the way. All agents are licensed and trained to follow the “Compass Way,” which aims to support and educate clients as they shop for health insurance policies.

Challenge

Compass Insurance knows how challenging shopping for health insurance can be. From complicated plans and exclusions to confusing policy terms — they wanted to simplify the renewal process for their customers.

They wanted to create a renewal process that made it easy for their clients to:

- ✓ Provide consent to start the renewal process
- ✓ Update personal, medical, and financial information
- ✓ Renew or select a new plan based on eligibility

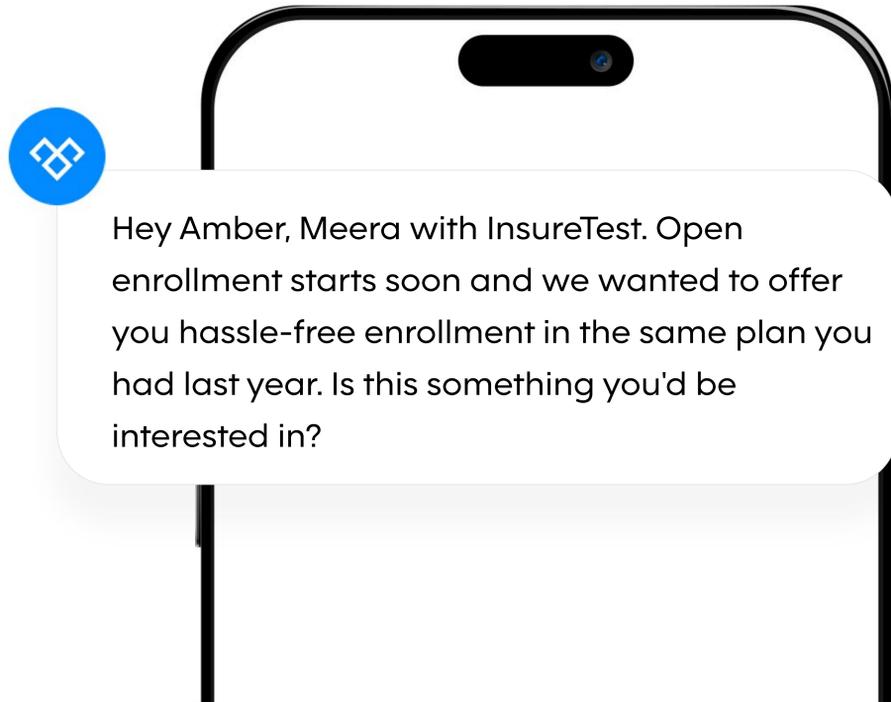
The existing renewal processes were far too manual and often required a lot of support from their agents. If they wanted to continue providing high-touch support, they would need to find a way to automate these essential steps.



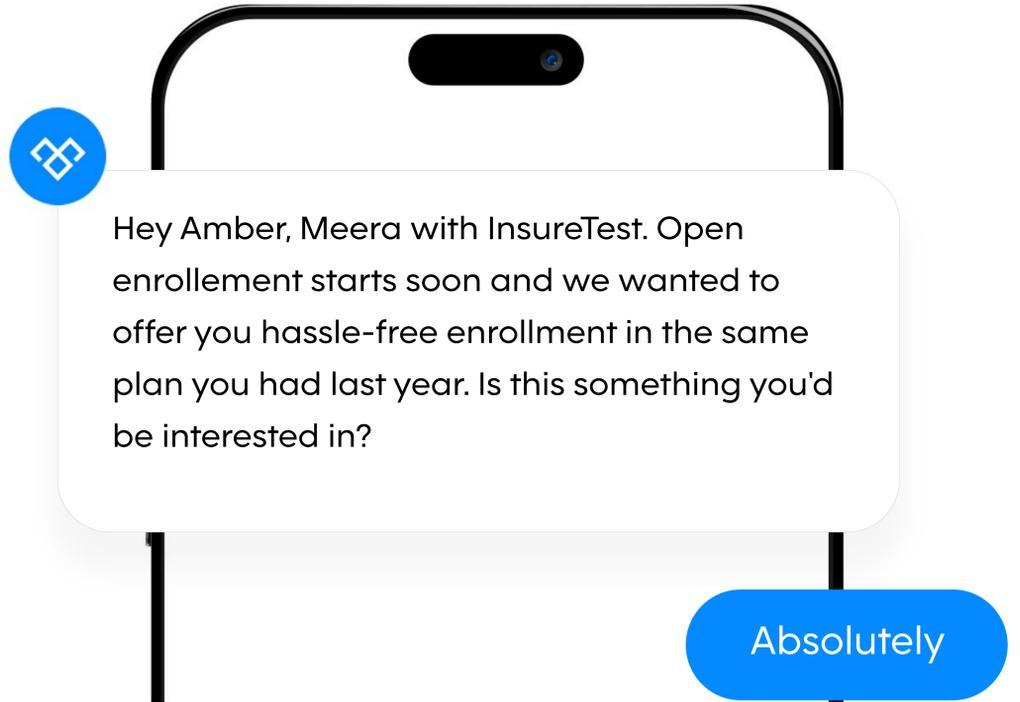
Solution

Compass Insurance learned about Meera.ai and its ability to enable automated insurance renewals through human-like AI texting. After a quick demo, it was clear Meera checked off all the boxes.

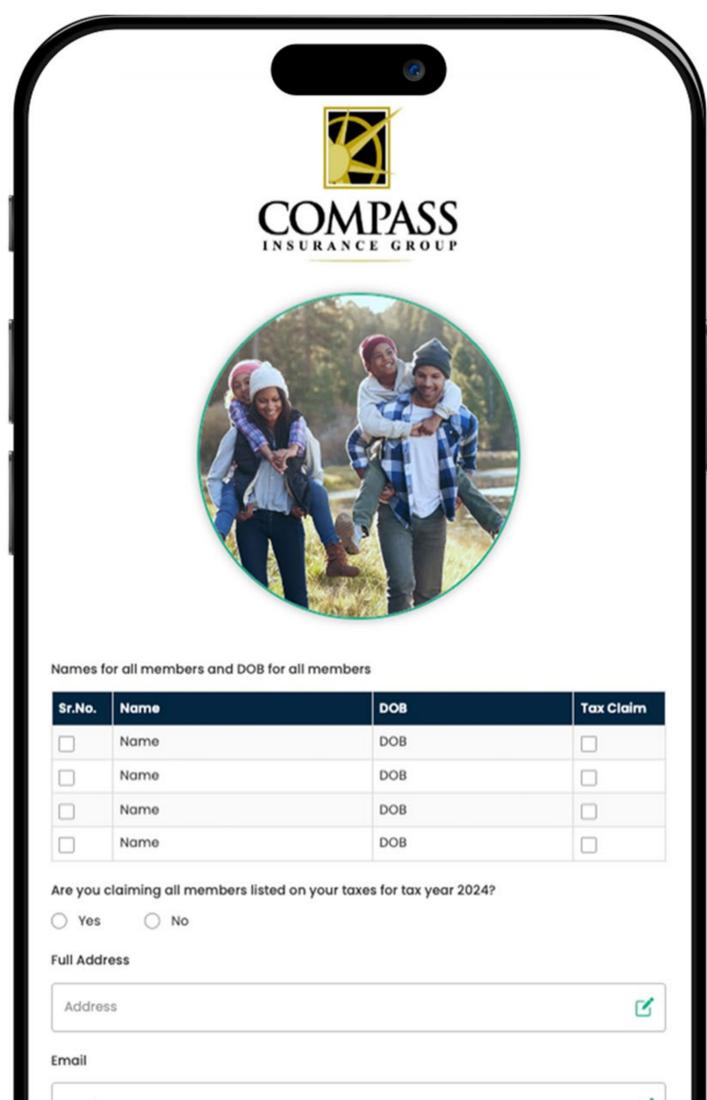
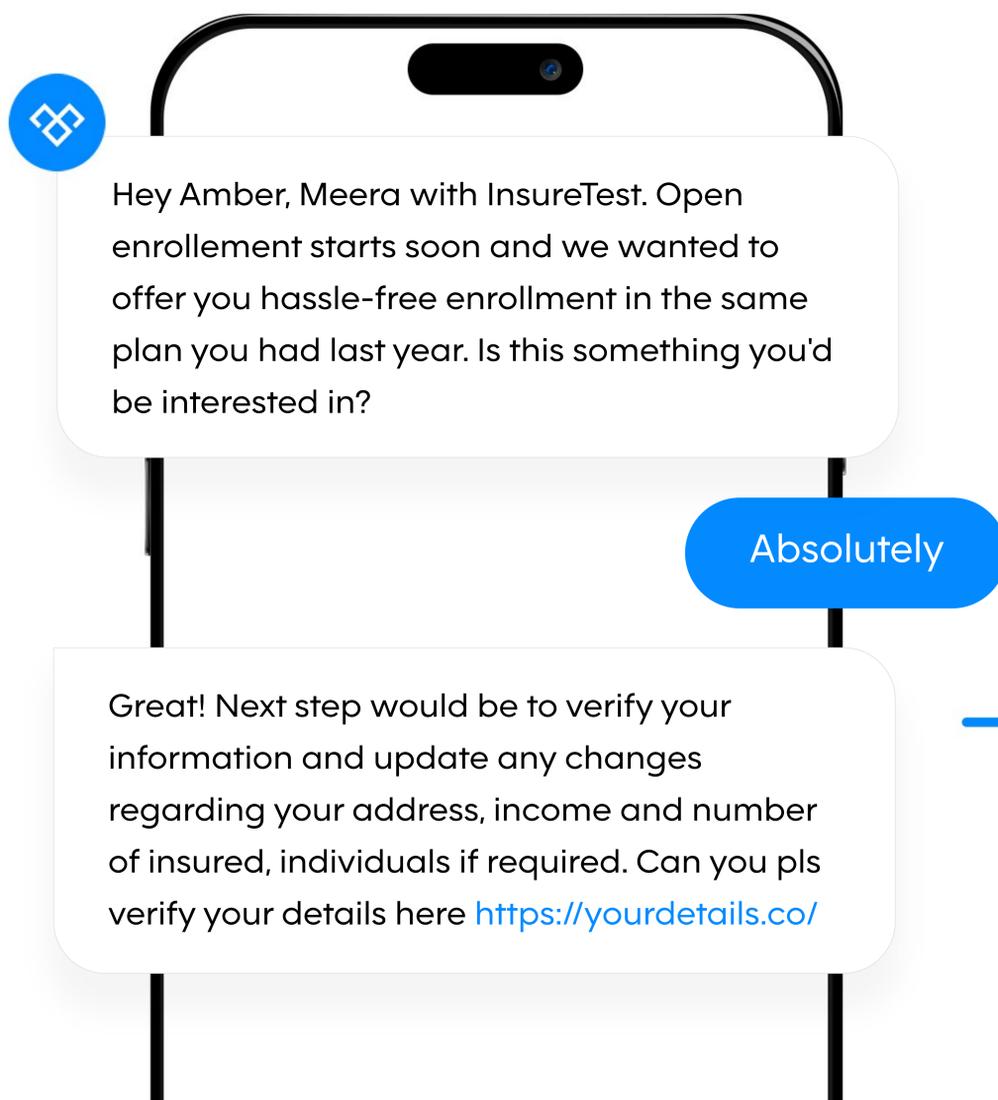
Send text message reminders to customers about upcoming renewals



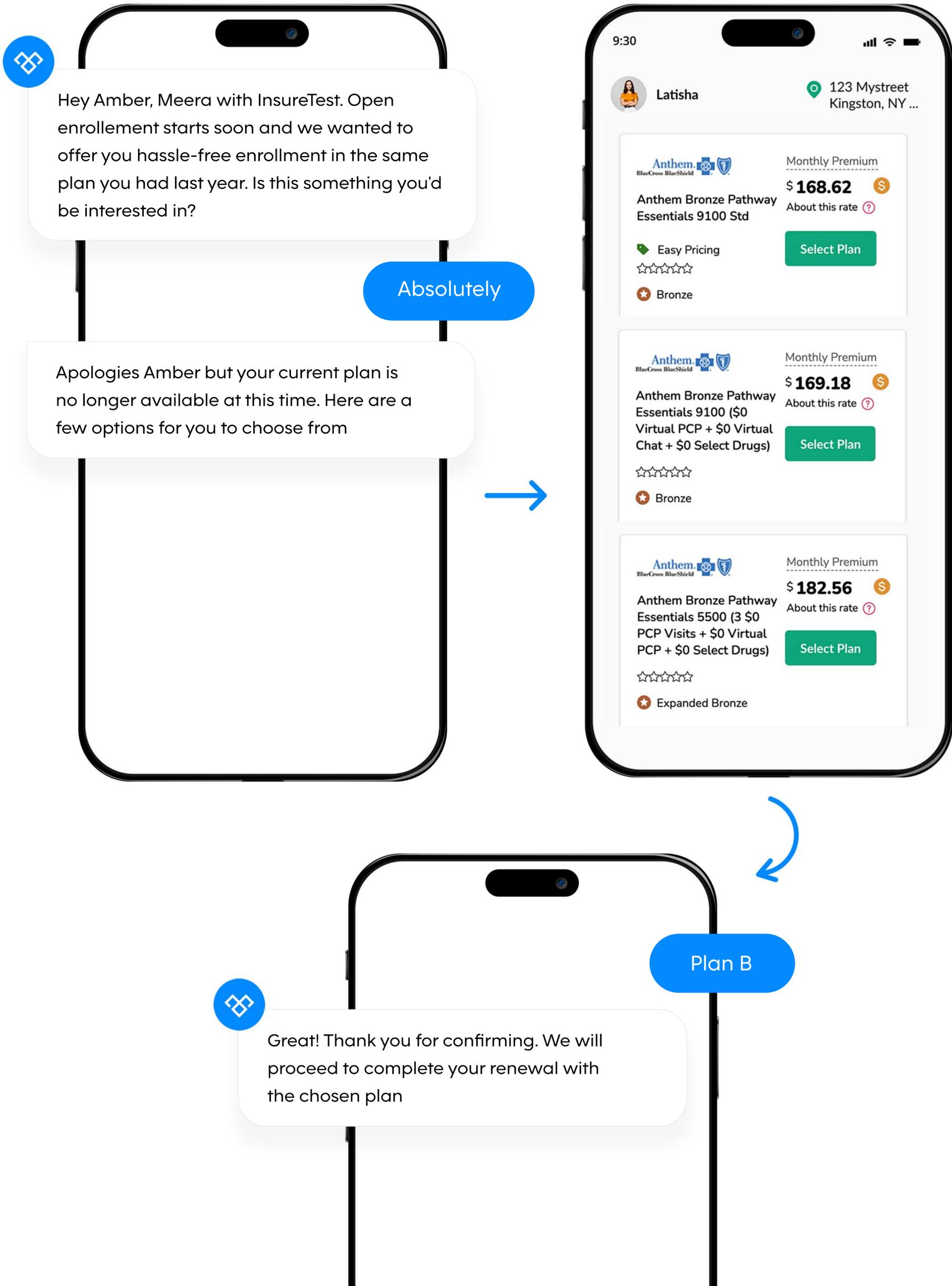
Automatically obtain consent to start the renewal process



Collect and update client account information and documents



Provides user with a seamless user experience



Results

Compass Insurance’s partnership with Meera.ai has allowed them to fully automate the renewal process, creating a positive user experience for renewals while freeing up agents to provide support that follows the “Compass Way.”

With Meera, the workflows for obtaining consent, updating customer information, collecting documents, and selecting plans is now automated.

Meera automatically sends renewal reminders and a special link to obtain consent and update important account information required to determine plan eligibility.

Compass Insurance saw positive results from an initial renewal campaign sent to **2,717 customers**. These results included:

57%

of customers **providing renewal consent**

56%

of customers **updating their account information**

More importantly, Meera allowed Compass Insurance to create **customized campaigns** based on customer needs and eligibility.

For example, Compass Insurance created three campaigns:



Campaign 1

for users looking to **renew** an unavailable plan



Campaign 2

for users looking for a **new plan**



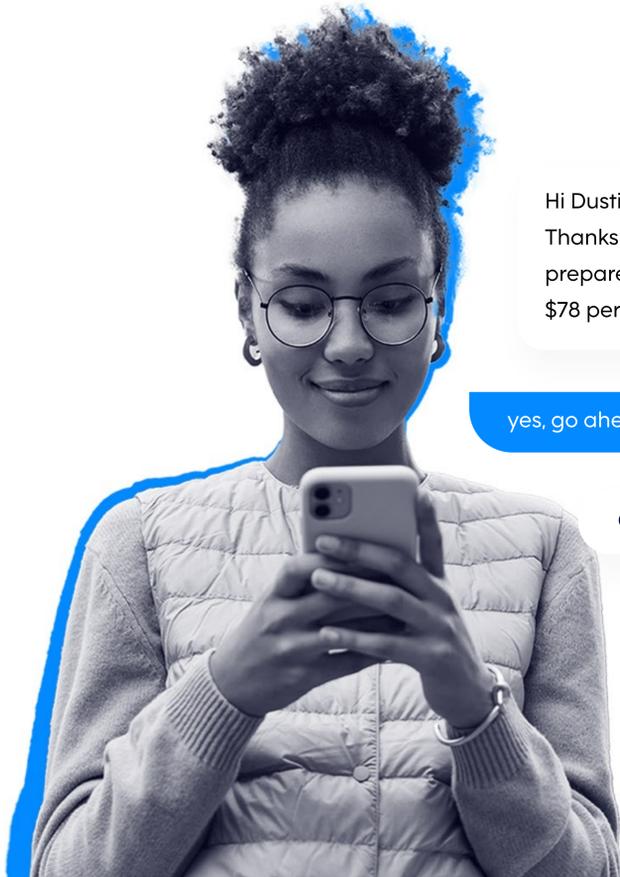
Campaign 3

for users with an available plan that could be **automatically** renewed

Compass Insurance is more confident than ever in their ability to provide high quality service based on the “Compass Way” of doing things.

With Meera, they have a powerful sales automation platform that can support their customers through the renewal process.





Hi Dustin, It's Erica at Compass insurance.
Thanks for your health insurance inquiry, we prepared an Auto Insurance quote for you at \$78 per month, is now a good time to review it?

yes, go ahead

Great! I will connect you in a few seconds.



About Meera

Meera is a leading text-based automation platform. Meera specializes in conversational lead development and nurturing.

Our AI-powered platform will communicate with your leads using machine learning to start conversations with your sales, marketing or admissions team.

This pioneering platform improves conversion rates and boosts sales for clients across industries by making communications both friendlier and more responsive.



MEERA.ai

Streamline your business with Meera's Text-Based **Automation** platform



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Request a demo