

How Direct Insurance saves 30 hours a month on employee training 💪🔥

In this case study, we'll explore how Direct Insurance Group:

- Automates the employee onboarding and training process for internal Core software
- Improves Core software adoption and activation across all departments
- Communicates important updates and software releases to employees
- Reduces support request volume for internal service departments (IT, training)



The Product Fruits platform addressed several challenges we faced with our internal software. As a financial institution, we work with robust and highly secure software. By integrating no-code onboarding, we enable 24/7 training for our employees, saving our service departments many hours each month.

Michal Kozub

Digitalization Leader, Direct Insurance Group



direct
pojišťovna

Direct Insurance Group, known locally as Direct pojišťovna, is a key player in the Czech Republic's insurance market. By 2024, the company had built a customer base of around 500,000. Renowned for its innovative approach, Direct pojišťovna specializes in offering a broad range of non-life insurance products, primarily through digital platforms.



Challenges:

- High number of support requests
- High training costs
- Overloaded training team
- Low efficiency of training
- Low software adoption



Results:

30 training hours
saved each month

70%
of Employees Onboarded
Within a Week

Increased
New Employee Productivity

Faster
Adoption of Internal
Software

The Product Fruits platform simplifies employee guidance in:

- Internal Core System

Coming Soon:

- Brokers Portal
(External Partnership Portal)
- Ticketing System
(3rd Party Software)

Use Case 1

First Steps with Product Fruits

The initial priority was to improve adoption and guidance within the Core system for the Customer Service Department, a key system user that serves the company's clients with a team of 60 people handling hundreds of requests daily. The long-term goal was to enhance software adoption across the entire organization.

Launching Employee Onboarding with Feedback-Driven Insights

After integrating the Product Fruits platform into the Core system, the Digital and Training Teams developed content for onboarding. A major challenge was understanding how employees interacted with the software, assessing their proficiency, and identifying areas where self-service support was needed.

To gather feedback, an NPS survey was deployed, asking employees, "How well do you understand the Core system?" Over 200 responses yielded an average score of 3.7 out of 5, confirming the need for improvements. Many employees requested features already available, highlighting gaps in training and awareness.

Based on these results, the Digital and Training Teams developed content focusing on:

- Frequent use cases for new employees, like client information and contract payments.
- Advanced use cases for existing employees, such as claims and vehicle details.
- Segmented content delivery by department (claims management, customer care, etc.).
- Further testing of Product Fruits elements for better system integration.

Content was integrated into the system via the Life Ring Button, with frequent use cases turned into interactive step-by-step tours. Tours were segmented by department, and some were mandatory to complete. Creating these walkthroughs took around two months.

Use Case 2

Onboarding and In-App Training for Newcomers

Every month, many new employees join Direct pojišťovna, most of them from the Customer Care, Claims Management, or Back Office teams. Since they heavily use the Core system, our priority is to ensure they are well-trained quickly and effectively.

Michal Kozub

Digitalization Leader, Direct Insurance



The internal onboarding process for new employees includes the following elements:



Welcome Tour Card: Welcomes employees and encourages them to proceed to the next onboarding step—opening the Life Ring Button.

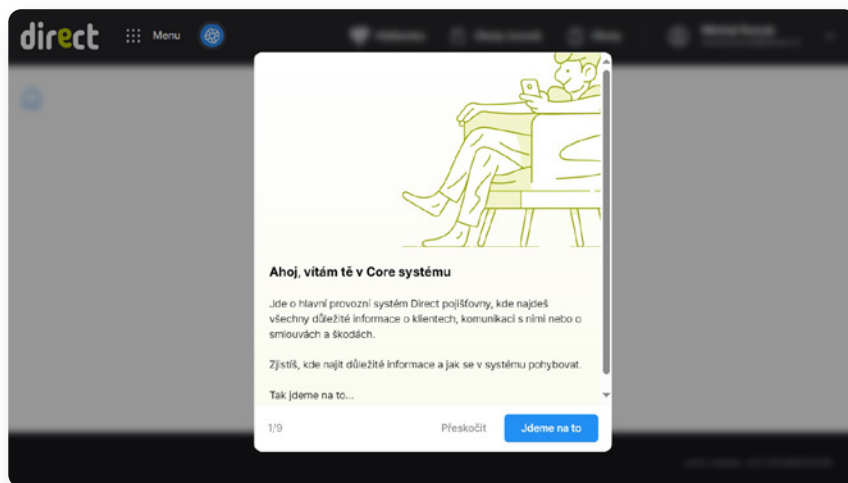


Life Ring Button (Help Center): Serves as an "onboarding container" (an alternative to an onboarding checklist) that delivers:

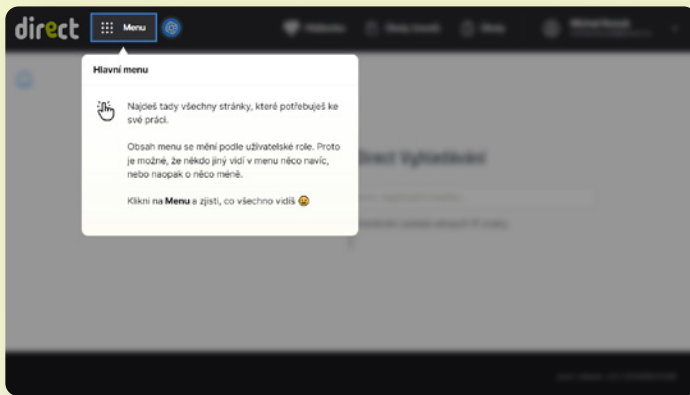
- A step-by-step **product tour** ("Take me around the platform") to familiarize employees with the major sections of the system.
- Step-by-step **feature tours** guiding employees through the most important use cases within the internal software.
- A **feedback widget** with multiple uses: gathering feedback on the current onboarding process, reporting bugs and issues, and submitting improvement suggestions.

A segmentation function ensures only relevant use cases (feature tours) are displayed in the Life Ring Button for new employees.

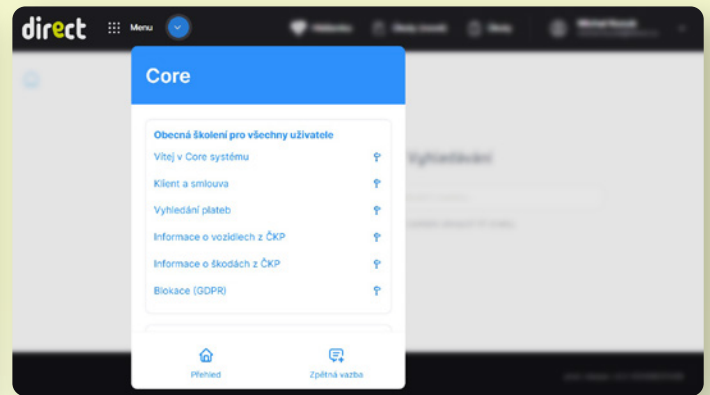
This use case saved tens of hours in training new employees because they are onboarded monthly with the same content. Moreover, efficiency is much higher when onboarding with Product Fruits is interactive. Everyone can set a pace for themselves and review any lesson they need.



Welcome tour



Product tour



Life Ring Button with Integrated Product, Feature Tours, and Feedback Widget

Use Case 3

Empowering Existing Employees with Self-Service and Software Updates

The onboarding flow for existing employees:

- Provides 24/7 self-help and on-demand guidance through educational content, featuring key use cases (**feature tours**) within the **Life Ring Button**.
- Keeps employees informed about important software updates directly within the system via the "News" section in the Life Ring Button and the "Newsfeed" element, eliminating the need to check emails or search outside the system for crucial updates.

“Employees now work more efficiently with real-time updates and releases at their fingertips. They can quickly adapt and stay informed, which also helps to increase their productivity.”

Michal Kozub

Digitalization Leader, Direct Insurance



Future Plans:

Integration of Product Fruits into the Partnership (Brokers) Portal:

After Product Fruits' flows significantly improved navigation for both new and existing employees, the Digital Team decided to apply a similar onboarding approach to the external partnership platform. This platform supports external insurance brokers in processing insurance contracts and communicating with the insurance company.

Integration of Product Fruits into the Third-Party Ticketing Software:

Direct Insurance will soon integrate Product Fruits into the new ticketing software developed by a third-party provider. The ticketing system is crucial for communication with customers via email or phone, serving both functions. It contains all the emails customers send to Direct Insurance and serves as a knowledge base for first-line teams who communicate directly with customers. Given its complexity and importance for communication, Direct Insurance needs to ensure that all employees can operate the system flawlessly. To achieve this, they will work closely with the ticketing platform provider to incorporate Product Fruits into the system.

Conclusion:

Direct Insurance's implementation of the Product Fruits platform has led to significant improvements in their internal processes, particularly in employee onboarding and software adoption. By automating and enhancing the training process, the company has successfully reduced training time, enabling faster onboarding and increased productivity among new and existing employees. The platform's ability to provide real-time updates and self-service options has streamlined communication, minimized support requests, and ensured that Direct Insurance employees are capable of utilizing the Core system effectively. Moreover, the successful integration and positive results are prompting the Digital Team to incorporate Product Fruits into third-party software and the partnership platform