

A Guide for Maximizing Insurance Field Agent Tracking and Reporting

Robust workforce management solutions deliver superior, actionable results

Insurance companies are facing pressure from all sides, including a tight labor market and increased competition from digital disruptors delivering low-cost, direct-to-consumer insurance through the convenience of apps. In this environment, maximizing the performance and efficiency of your field agents is more important than ever.

With the responsibility for managing multiple claims coupled with customers' expectations for quick resolutions, your field agents are dealing with a challenging work environment. Long hours and difficulty tracking and reporting their time can quickly lead to high rates of overtime and low employee morale and engagement. Both of which impact your ability to deliver excellent customer service while controlling costs.

This step-by-step guide was developed to help insurance organizations navigate the complexities associated with modernizing their field agent workforce management.



Experience workforce innovation that works

In today's crowded insurance market, you can't afford to overlook opportunities to differentiate your company and drive profitability. Let UKG (Ultimate Kronos Group) for Insurance help you manage your most valuable strategic asset: your workforce. Our workforce management solutions provide the proven functionality, complete automation, and high-quality information you need to increase operational efficiencies, minimize compliance risk, and enhance the customer experience for bottom-line results.



Invest in a modern workforce management solution

Advancements in modern workforce management technologies are helping insurance companies better manage their field teams. In-depth reporting features that incorporate AI help companies analyze data and make more informed workforce productivity decisions. And robust mobile tracking capabilities are reinventing insurance field agent tracking and reporting for superior results.

In today's crowded insurance market, you can't afford to overlook opportunities to drive efficiency and profitability while building a productive, engaged team of field agents.



Implement mobile timekeeping to optimize productivity

Helping field agents maximize their productivity throughout the workday, while also ensuring they're engaged, is critical for insurance companies. Field agents typically face long days dealing with challenging customers and bumper-to-bumper traffic. The last thing agents want to do when they get home or back to the office is power up their laptop and fill out a timecard. Plus, by the end of the day, it can be impossible to accurately recall exactly how much time they spent on each claim, leading to errors and an inability to accurately assess costs.

With the robust mobile timekeeping capabilities found in modern workforce management technologies, employees in the field can seamlessly enter their time as they complete their work. Advanced mobile capabilities for field agents deliver multiple benefits, including:

- Improved timekeeping data accuracy
- Mitigated compliance risk
- Geofencing technology to ensure employees are in the right locations
- Streamlined absence management (submitting TOR, checking accruals, etc.)
- Increased employee morale



Employ robust reporting features to help answer complex questions

Have you ever wondered “Is the claim workload too demanding or is the field agent underperforming?” There will always be some claims that require more hours than others. This is just the cost of doing business — not every claim is an average one. But without modern workforce management reporting, how is management supposed to know whether a time-consuming claim results from reasons outside the field agent’s control, or if the cause is related to the individual’s job performance?

New, advanced field agent reports can now help managers quickly identify individual and team performance concerns, allowing you to deliver more targeted coaching opportunities and better manage overtime allocation. Insurance companies can measure valuable metrics such as:

- Total actual hours worked per employee in any given pay period
- Average time at appointment (overall, region, and individual)
- Overtime hours by role
- Productive hours by business unit (using productive vs. nonproductive pay codes)

This in-depth level of reporting gives you the data you need to understand claims costs and employee performance so you can make informed business decisions to improve the effectiveness and profitability of your field agent workforce.



[Learn what a day-in-the-life could look like at your insurance organization with industry-leading UKG workforce management technologies.](#)