

Speech & Conversation Analytics for Insurance Brokers by ChorusCX

From the first quote to the final claim, know exactly what was said, explained, and disclosed on every call, across every line of business and every producer.

Every call your agency takes, new business quotes, renewals, claims, policy service, carries E&O and regulatory exposure that most agencies only discover after a complaint, a claim denial dispute, or a Department of Insurance inquiry. Speech & Conversation Analytics by ChorusCX transcribes and analyzes 100% of those calls, not the small sample a manual QA team can realistically review.

Instead of finding out during litigation that a producer misrepresented coverage, an unlicensed staff member gave advice, or a required Medicare disclosure was skipped, ChorusCX flags it the same day, with the transcript and the exact moment marked for review.

Key Features

- ▶ **E&O Risk Monitoring:** Flags coverage misrepresentation, inaccurate policy explanations, and missing exclusions language before they turn into a claim against the agency.
- ▶ **Licensed Producer Compliance:** Confirms that only licensed agents are quoting, binding, or advising on coverage.
- ▶ **Medicare & CMS Compliance Monitoring:** Tracks required scripting and disclosures on Medicare Advantage and Medicare Supplement calls against CMS marketing rules.
- ▶ **Claims Handling Oversight:** Reviews claims calls for accurate process explanation, timely follow-up commitments, and appropriate tone with policyholders in distress.
- ▶ **Renewal & Retention Signals:** Flags when clients mention shopping competitors or rate concerns, so retention teams can intervene before the policy lapses.
- ▶ **Cross-Sell & Bundling Detection:** Identifies missed opportunities to bundle auto, home, umbrella, or life coverage during service calls.
- ▶ **Vulnerable Customer Detection:** Flags signs of confusion, cognitive decline, or financial distress, especially important on senior-market and life insurance calls.
- ▶ **Keyword & Risk-Term Search:** Custom search criteria to pull every call mentioning a specific policy type, complaint, or risk phrase across the entire agency in seconds.
- ▶ **Vendor-Agnostic:** Works with the phone system you already have. No rip-and-replace, just export call recordings from your existing platform (Avaya, Mitel, Cisco, NEC, Encore) and ChorusCX handles the rest.

Get Started with Speech & Conversation Analytics

Whether you're trying to reduce E&O exposure, tighten Medicare compliance, or stop losing renewals to the agency down the street, ChorusCX turns every recorded call into a searchable, defensible record.

Book a meeting with our team to see how Speech & Conversation Analytics by ChorusCX can reduce agency risk and protect your book of business at the same time: sales@choruscx.com.

Benefits



For Compliance & E&O Risk Management

- 100% Call Coverage: Every call analyzed, not a small sample, for full visibility into E&O and regulatory exposure.
- Reduced Misrepresentation Risk: Automatic flags for inaccurate coverage explanations and missing disclosures.
- Exam and Audit-Ready Documentation: Quantifiable evidence of compliance when a carrier, state DOI, or CMS audit comes asking.



For Claims

- Consistent Claims Communication: Every adjuster and service rep measured against the same standard for accuracy and tone.
- Fewer Claims Disputes: Documented record of what was communicated about coverage and process from day one.



For Sales & New Business

- Higher Quote-to-Bind Conversion: Benchmarks producers against top performers to identify what actually closes business.
- Faster Ramp-Up for New Producers: Data-driven coaching instead of weeks of call shadowing.
- More Cross-Sell Revenue: Surfaces bundling opportunities producers are currently missing.



For Renewals & Retention

- Earlier Retention Saves: Flags at-risk renewals before the policy lapses to a competitor.
- Better Client Experience: Sentiment tracking catches frustrated policyholders before they leave a bad review or file a DOI complaint.



For Agency Leadership

- Visibility Without Micromanaging: See what's actually happening across every book, office, and line of business without sitting in on calls.
- QA Time Reinvested Where It Counts: Automation clears routine checks so your team focuses on the judgment calls only a person can make.
- Protects Agency Reputation and E&O Rates: Catches the calls that create liability before they turn into a claim, a complaint, or a premium increase on your own E&O coverage.