



Proven CX Business Impact

This CX case study was selected in September 2025 by an independent panel of CXPA judges for recognition of its demonstration of the positive business impact created through a customer experience focus.

CXPA Proven CX Business Impact: Marsh McLennan — Enterprise-Wide CRM Modernization and Intelligent Customer Engagement

Company Overview

Marsh McLennan is a leading global insurance and professional services firm with more than 50,000 employees and annual revenues above \$5B. The company provides risk, strategy, and people solutions to clients worldwide.

Business Challenge

Legacy CRM systems and siloed data platforms created inefficiencies across Marsh McLennan's customer service operations. Agents struggled with prolonged handle times, fragmented knowledge resources, and limited real-time insights. Customers faced extended wait times, inconsistent resolutions, and declining satisfaction. Operational costs increased as repeat contacts and escalations rose.

To learn more, and to submit your CX business impact case study, visit <https://cxpaglobal.org/cx-value/case-studies>

CX Initiative: CRM Modernization & Intelligent Engagement Transformation

Marsh McLennan executed a multi-year enterprise-wide program to modernize engagement and improve efficiency. Key actions included:

CRM Consolidation: Migrated multiple legacy systems into a unified Salesforce ecosystem.

AI-Enabled Engagement: Integrated an Intelligent CX platform, intelligent chat, and proactive IVR notifications.

Predictive Insights: Enabled real-time data orchestration and proactive outreach by integrating customer data across systems.

Agent Enablement: Centralized knowledge base and scenario-based training improved first-contact confidence.

Change Management: Governance committees, phased deployments, and agent feedback loops ensured adoption

Proven Business Impact

- Generated **\$4M+ in incremental revenue** through stronger renewals and upsells tied to improved NPS.
- Achieved **\$1.1M in annual operating cost savings** from reduced handle times.
- Average Handle Time (AHT) dropped 14%
- First Contact Resolution (FCR) improved from 50% → 80%
- Proactive IVR updates reduced unnecessary inbound “status check” calls.
- NPS rose 12 points in nine months.
- CSAT improved from 65% → 87%
- **Churn reduced by 9%** in key customer segments

Core Business KPIs Impacted

- Renewal & Upsell Revenue
- Operational Cost Savings
- Average Handle Time (AHT)
- First Contact Resolution (FCR)
- Churn Rate & Retention
- Customer Satisfaction (CSAT)
- Net Promoter Score (NPS)