



SIMPLIFY ^S

THE CLIENT

Simplify is the UK's leading independent conveyancing and property services group.

Through its relationships with estate agents, mortgage intermediaries, house builders and property administrators, Simplify plays a vital role in helping the country move home.

As the market leader, Simplify has successfully helped hundreds of thousands of families move home, and continues to help many thousands more every year.

- Six conveyancing brands
- A property services specialist
- One direct-to-consumer brand

Simplify is here to making moving home easier, less stressful and more profitable for its customers.

Simplify's ambition is to simplify moving.

As part of the wider proposition to introducers, a sales referral service is a key product, where Simplify receives leads and sells conveyancing and related services to home movers.



Business Needs

Simplify is an inherently technology-driven business that looks to fulfil its ambition to 'simplify moving' by embracing innovative new tools and approaches to customer care that make property transaction experiences easier, more efficient and less stressful for all parties involved.

Simplify were therefore keen to examine new AI-driven technologies that might further improve the conveyancing experience for home movers and introducers whilst, crucially, increasing the company's sales conversion figures.

As Sales Conversion Director Rachel Burrows explained, this would see Simplify forging an innovative path in an otherwise staid industry.



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Rachel Burrows,
Sales Conversion Director, Simplify

"We're always looking to improve and fine-tune our already excellent processes and knew that technology could help us have more engaging and effective conversations with our clients, resulting in more instructions."

A key issue Rachel had identified was the inconsistency of sales messages. "We had 50 sales advisors saying a number of different things, all hoping to get the same result.

"What we knew is that if we could tailor their approach, all 50 sales advisors could be having very similar and better conversations, achieving even better results."

Rachel was tasked by Simplify's Senior Leadership Team with determining how AI and automation - in particular, speech analytics - could assist the business.

"I spoke to a number of different businesses and sat through product demos but felt Avaira was a better, more agile fit for us," she recalls, noting too that not only had the company been recommended to her through her industry investigations, but also due to having a highly sophisticated customer experience (CX) and speech analytics solution, Xdroid.



The Solution

Simplify opted for a post-call Xdroid analytics solution hosted within a secure cloud environment, custom-integrated with the company's existing RingCentral unified communications platform.

Customisation was a key selling point for Rachel: "The capability of the technology to be built around what we wanted was key. It could be developed to support our business in the way that we wanted to use it. The cost was also very reasonable for the return we expected to get."

Of course, she still needed have confidence that Avaira and Xdroid could deliver on the undoubted promise the solution offered.

Step one, then, was to initiate what proved to be a highly successful proof of concept exercise, focused on Simplify's financial and mortgage service introductions.

This quickly demonstrated Xdroid's capabilities. "Xdroid helped us identify why and when our advisors weren't presenting as they should, enabling us to improve the volume of appointments booked," says Rachel.

The Avaira CX team worked closely with Rachel to determine exactly how to configure Xdroid in support of her objectives.

Confident in the technology's capabilities, Rachel introduced Xdroid to the 50-strong conveyancing sales team, working closely with Avaira's CX experts to determine exactly how Xdroid should be configured to meet her objectives.

"We had an idea of how the conversation should sound to a customer to get the result we wanted, an instruction – and, as a result, we wrote an initial framework for how we wanted the conversation to flow."



Feedback from Avaira's specialists quickly led to a refinement. "The Avaira guys really helped us understand that what we'd come up with was too big and that we needed to prioritise and narrow down to specific statements or questions."

Working in partnership with Rachel, Avaira's specialists identified tags - specific words and phrases - and, using Xdroid's AI-powered capabilities, trained it to log and report on their usage.

This process meant that, while agents didn't need to slavishly follow a script, they could nonetheless tick the right boxes - and be seen to do so - to optimise their sales performance.

"The conversation feels better when it is free flowing. We don't need our salespeople to read a script word-for-word, but to shape our conversations and use specific words and phrases that we've tagged in Xdroid. This means they can have an effective sales conversation that informs the customer and guides them in the right direction."

Such is Xdroid's power, it can capture, transcribe and analyse every call handled, yielding a variety of metrics which can inform processes and training. Automatically generated reports score usage of those sales-generating tags by individual agent, team and across the department.



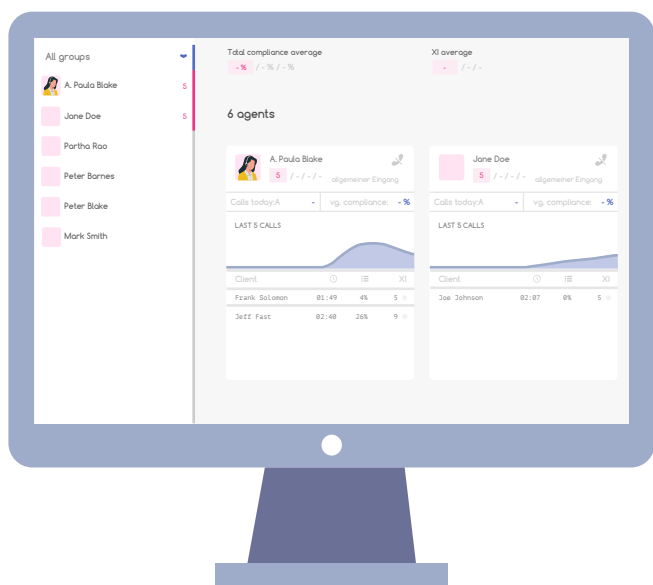
The Benefits

Having completed a soft launch in April 2024 that enabled further refinement of the conversational framework, the solution was rolled out across the full sales team the following month.

Its impact was immediate.

Customer service has been enhanced as advisors are able to better engage and explain the service being provided. For example, when identifying tags and creating the framework, it became clear that many people at the beginning of the home moving process don't understand what conveyancing is. This is clearly a big deal when you're a business acting on a lead or referral to offer precisely that service.

"We're trying to sell a high value service, and we're talking to thousands of customers. Xdroid helps us identify when our advisors are asking customers what they know about conveyancing and then explaining it in a succinct way to ensure they know exactly what we're talking to them about."



"It feels like a partnership when I'm on calls with the Avoira guys, like I'm working with people who are on my team, reaching for the same goal. That's really important."

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Advisors themselves have also been encouraged to adopt the tags to boost their performance. Simplify requires them to score a minimum of 65% on their Xdroid scorecard to qualify for what is a generous and uncapped bonus scheme.

Very few failed to hit that benchmark on launch, and the global score had hit 73% by the following month. And that upward trajectory subsequently has been maintained since.

With advisors now consistently pressing the right buttons, conversion rates have also significantly increased.

"We expected to see a five-percentage point improvement year-on-year in the first three months of deploying Xdroid. In fact we secured an eight-percentage point increase in the first month. That's massive," reports Rachel.

She adds that the success of the project is in no small part due to the relationship forged between Avoira and Simplify. "It feels like a partnership when I'm on calls with the Avoira guys, like I'm working with people who are on my team, reaching for the same goal. That's really important."

"They've been really agile, helpful and patient."