



Assekuranz Herrmann Büro-Carrée in Ettlingen (near Karlsruhe, Germany)

# CAS genesisWorld

## CAS teamWorks

### At a glance

**Industry sector: Insurance / Finances**

#### Goals / requirements

- ▶ Central address file largely free of duplicate addresses and with company profiles and evaluations
- ▶ Electronic customer dossier available throughout the company
- ▶ Central document administration
- ▶ Uniform communication platform / CI
- ▶ Access for everyone and anywhere
- ▶ Product management, quote qualifying, knowledge base
- ▶ Marketing tools / campaign management
- ▶ Connection to the insurance software
- ▶ Mobile access to data (Laptop replication, internet clients, smart phones)
- ▶ Field service sales portal for Key Accounts and field service in one database

#### Benefits and advantages

- ▶ Current and valid sales information
- ▶ Organisation of complete document administration
- ▶ Saves time searching for information
- ▶ Uniform communication platform for implementing CI and CD
- ▶ Speeds up many work processes
- ▶ Fast evaluation of key figures, visit reports, etc.
- ▶ Customers benefit from improved service
- ▶ Daily successes motivate employees – work is fun again

# Success story

CRM BEST PRACTICE  
**AWARD**

ASSEKURANZ HERRMANN

## Central sales information system with integrated customer data

The greatest asset of leading insurance intermediary Assekuranz Herrmann is its customers' confidence. To be able to recognise and respond to the highly varied needs of its customers in the future, Assekuranz Herrmann installed CRM-Groupware CAS genesisWorld with additional CAS teamWorks portal software as its central sales information system. The system now efficiently supports insurance brokerage and marketing.

Assekuranz Herrmann is an independent observer of the insurance market acting as a connecting element between policy holders and insurers. The task of an independent consultant is to find the most favourable conditions for complete uniform insurance protection for industrial, commercial, or private clients, taking into consideration the client's desired risk profile. Even after a policy is signed, however, continual verification is needed to determine whether insurance protection meets current needs or needs to be adjusted. And of course if a claim is submitted, the company supports its customers in a consulting role.

### One solution for employees, field service, representatives, and clients

Complaints from employees who were unsatisfied with their daily work and the tools available for it provided the initial impetus for the CRM project. The internal organisation of the company is also going through the process of realigning itself to a customer-oriented structure providing complete support for customers with special customer teams and service centres.

A CRM solution alone was not extensive enough for employees working inside company offices. The solution should provide a single information system for everyone, for field services employees and employees working in the office, for independent agencies and part-time representatives. The CRM system should also provide mobile and web-based access and especially offer an additional portal software. And of course, everything must be designed so that information does not need to be maintained and administered multiple times in individual programs. Rather than imposing more work, the solution should shift a significant amount of work away from employees. The company was also very interested in making a portal available to key customers.

### Fast introduction thanks to good project planning and scheduling

Within 7 months of the decision, CAS partner Pollak Software GmbH (Karlsruhe) had developed interfaces to the already existing systems (OASIS and others) and were representing business processes on the CRM system. Data was migrated from existing, non-central data repositories and above all was cleaned. "Completing such a demanding project in such a relatively short time is only possible with a good, experienced project partner and lean project planning and scheduling," reports Michael Bertrand, authorised negotiating agent and IT Director proudly.





**“Our greatest asset is our customer’s confidence. The central CRM system and connected customer portal makes all current and valid sales information available. Our customers benefit from improved service.”**

**Michael Bertrand, authorised negotiating agent and IT Director, Assekuranz Herrmann**

#### Project data

- ▶ In use since February 2005
- ▶ CAS genesisWorld and CAS teamWorks throughout the company
- ▶ Implemented within 7 months
- ▶ Interface to OASIS from NKK
- ▶ CRM Best Practice Award 2005

#### Customer

Assekuranz Herrmann, Ettlingen, Germany  
www.assekuranz-herrmann.de

- ▶ Founded in 1905
- ▶ Over 120 employees, 30 in field service
- ▶ One of the largest family managed companies in the German insurance industry
- ▶ Insurance intermediary providing complete uniform insurance protection at the best market terms
- ▶ Service provider for industrial, commercial, and private clients

#### Project partner

Pollak Software GmbH, Karlsruhe, Germany  
www.pollak-software.de

#### CAS genesisWorld and CAS teamWorks

- ▶ Professional customer management
- ▶ CRM and Intranet / Extranet with shared database
- ▶ Supports internal processes, increases efficiency
- ▶ Simple distribution of information, transparent at any workstation
- ▶ Full service company portal for employees, customers, suppliers, or partners
- ▶ Flexible, integratable, extendable
- ▶ Excellent price / performance ratio
- ▶ Established products – winners of several awards
- ▶ Over 110 CRM specialists provide on-site support

### Say goodbye to double and triple data maintenance

Employees benefit from the CRM solution in many ways: There is no more double data maintenance and information search times have been cut significantly. Employees can now do their job better, more quickly, and more efficiently. With access to all available information about customers, they can offer improved surface to customers. Daily successes motivate and inspire employees. Complaints about work routines have become a thing of the past and work is fun again.

Appointment and task management, including resource management and vacation planning, has generated enthusiastic response. With just a few clicks, any employee can now view colleagues’ appointments and vacation schedules. One very heavily used feature is delegating of tasks with monitoring for on-time completion. For example, this feature provides complete post-processing of an annual meeting. No follow-up tasks are forgotten or completed too late.

### Uniform appearance demonstrates professionalism

The new document administration system also makes work easier. In the past, approx. 180,000 documents were stored in complex directory structures, some public, some private. Searching for a document was inevitably complicated and time-consuming. With the central storage system now used, all documents can be found in just seconds in the customer dossier or by searching with one of numerous categories. Now a whole series of document templates not only ensures a uniform CI and external appearance, it also simplifies and speeds up the process of creating new documents. Employees can also rely on the accuracy of the text templates. In the future, document life cycle will also ensure quality.

### Always up-to-date

The Intranet for employees and the field service sales portal for all independent agencies and part-time representatives provide all important sales information, continuously up-to-date. All current forms, sales information, marketing campaigns, information about competitors, and much more may be found here.

While employees have sometimes been inundated with information in the past, the Intranet / Extranet works like an expert system or reference source for current information. One especially noteworthy feature: the portal and CRM system are based on a common database. Therefore documents only need to be entered once. If provided with appropriate identification for public release, documents are also available in CRM and/or in various portals.

### Outpacing the competition and ensuring job future

Herrmann Insurance is blazing new trails with the project. Michael Bertrand looks back to the origins of the project: “We had no reference companies to provide orientation and no experience whatsoever with CRM in the industry sector. There were no CRM providers familiar with the insurance business and its special features. But several times in the past, we had played the role of pioneer and helped nudge the market in the direction of the future, usually with positive results – as was also the case in this situation.”

The results of the CRM project are plain to see: Today every employee recognises the value and significance of a customer at a glance. And thanks to our detailed system for classifying and categorising contacts, we can address customers on a very individual basis, providing them with highly selective quotes customised precisely to the needs of the customer. Bertrand summarises the approach to the project: “We have not attempted to measure the benefits derived precisely, since quantifiable benefit was not a key issue. We were interested instead in benefits for employees and their basic satisfaction level. The customer portal for Key Accounts will offer additional added value in the future that will serve to distinguish Assekuranz Herrmann from the competition, thereby ensuring the survival of our company and our jobs.”