



CRM system as OVB Holding's standard in 14 European countries



Customer
OVB Holding AG

Industry
Financial services

Company profile
OVB Holding AG is one of Europe's leading providers of financial services with subsidiaries in 14 countries. Its staff of over 9,600 advisors and financial consultants offer sound financial advice to over 2.5 million customers, through a portfolio of about 100 well-known product partners. OVB's services cover asset management (including diversification and accumulation), pension schemes, and home financing.

Role of ec4u
The first part of the assignment required ec4u to study the multi-faceted processes partly from a country-specific legal standpoint, and to define a sales reference process valid all across OVB. This formed the basis for developing the technical, integration, cost, and other requirements for selecting the CRM system.

Benefits
The result was an impressive instrument for issuing a tender, which precisely and transparently mirrored all facets of OVB's unique needs for a solution.

The group lacked a standard European-wide CRM system that could map unique country-specific features.

OVB Holding AG is a multinational corporation growing dynamically across its country divisions. This situation increasingly called for a standardized pan-European CRM system that would be technically uniform across the board for all OVB users, and yet be able to map various local conditions and special characteristics of the sales force and incorporate all associated processes.

Axel Weeber, CIO at OVB Holding, described the fundamental premise succinctly: "Since we work primarily with self-employed financial services consultants, the CRM system must function like an integrated platform. Our strategic interest is in offering advisory services of a uniform high quality."

PROFESSIONALLY BACKED TENDER

These special requirements led to the need for a professional tender on evaluating the market for the CRM system, which Weeber justified by pointing out that, "The performance matrix is extremely complicated, while some of the demands and processing conditions vary greatly among the 14 country divisions, each with its unique mentality." OVB awarded the contract to ec4u expert consulting AG, known for its expertise in the CRM sector and the tender process.

Weeber went on to stress, "ec4u's consultants had done a fantastic job in the last two projects, and we never change a winning team when selecting our partners."

DEFINING REFERENCE PROCESSES

The first part of the assignment required ec4u to study the multi-faceted processes partly from a country-specific legal standpoint, and to define a sales reference process valid all across OVB. This formed the basis for developing the technical, integration, cost, and other requirements for selecting the CRM system. This in itself was quite a challenge, as Sascha Krause, ec4u's project leader remarked, "Initially, we had to clarify the terminology across the borders and identify the underlying commonality. For example, commissions or minutes of an advisory meeting

in Germany could vary in terms of the content or context from what one understands in other countries."

SYSTEM CHOICE FOR THE PATH TO SUCCESS

ec4u's thorough preparatory work paid-off: "The result was an impressive instrument that precisely and transparently mirrored all facets of our unique needs for a solution in the tender," said Oskar Heitz, Chairman of OVB. Measurable benefit also resulted from further support for the market evaluation, which covered a systematic selection process, scoring, and moderation of meetings with vendors. Weeber underscored this statement: "The CRM project is of strategic

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Axel Weeber, CIO
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