



SV analysiert den Nutzen der Einführung einer CRM-Standardsoftware



Customer

SV SparkassenVersicherung

Industry

Financial services

Company profile

SV SparkassenVersicherung is the third largest public insurer and the biggest insurer of buildings in Germany. It is also among the major players in its territory in the life insurance segment.

Role of ec4u

A multi-phase project conducted over six weeks facilitated a quick decision. This accomplishment required a streamlined project organization, and the application of ec4u methodologies and best practices.

Benefits

ec4u's support for the CRM program at SV SparkassenVersicherung helped generate a solid decision basis for mapping the target processes in standard CRM software.

SV SparkassenVersicherung has several systems that handle comprehensive CRM processes in-house and for field personnel. The question arose whether standard CRM software would generate adequate advantages in mapping the core processes.

SV SparkassenVersicherung ("SV") is a long-established and modern insurer based in the regions of Baden-Württemberg, Hesse, Thuringia, and parts of Rhineland Palatinate. In 2007, premiums paid for roughly 7.7 million policies totaled about € 2.7 billion. In addition to typical policies, SV also offers comprehensive services like risk management, tailored to customer needs.

SV sought a need-based software program to enable it to achieve and optimize advanced customer relationships – for its office staff and field personnel.

CONSOLIDATED SALES PROCESSES AND STANDARDIZED CRM SOFTWARE FOR HIGHER LONG-TERM EFFICIENCY

SV's strategic interest in optimizing CRM arose from the realization that it could boost the quality of service and sales performance significantly by providing identical and current customer relationship information to both office staff and field personnel. This led to the decision to consolidate the processes and use the same CRM software – to raise the efficiency sustainably through the latter measure.

Moreover, the requirements stated that relevant CRM system should be user friendly and offer all appropriate functionalities. In particular, the software should facilitate all relevant core processes for sales – information by phone, activity management, access to customer correspondence, communication between different organizational units, service management, and of course ease telephoning.

BASIC EVALUATION OF ALL PROCESSES WITH STANDARD SOFTWARE

The primary assignment of CRM specialists at ec4u strategy consulting AG was to identify and present the pros and cons of implementing standard software in detail.

These findings were to serve as the initial basis for projecting productivity increases with the new CRM system.

This part of the assignment compared the processes in current and in various target application landscapes, initially by focusing on office services. ec4u applied its knowledge of best practices to perform the proper comparison.

The goal was to establish a sound decision basis quickly, by comparing the current CRM solution at SV versus standard CRM software. The methodology involved the following three phases that were conducted in close cooperation with SV:

1. Evaluation of existing processes covering the selection, recording, and analysis of core procedures for office tasks.
2. Analysis of target processes with documenta-

"ec4u applied its comprehensive knowledge on processes and deployment of standard CRM software to quickly deliver a solid basis for us to reach an economical decision on our project."

Klaus Westen,
Manager, Principal Operations Dept.
SV SparkassenVersicherung Holding AG

3. Comparison of current versus target processes to derive a valid basis for assessing the benefits.

This evaluation process clearly highlighted the greater benefits of a standard CRM solution.