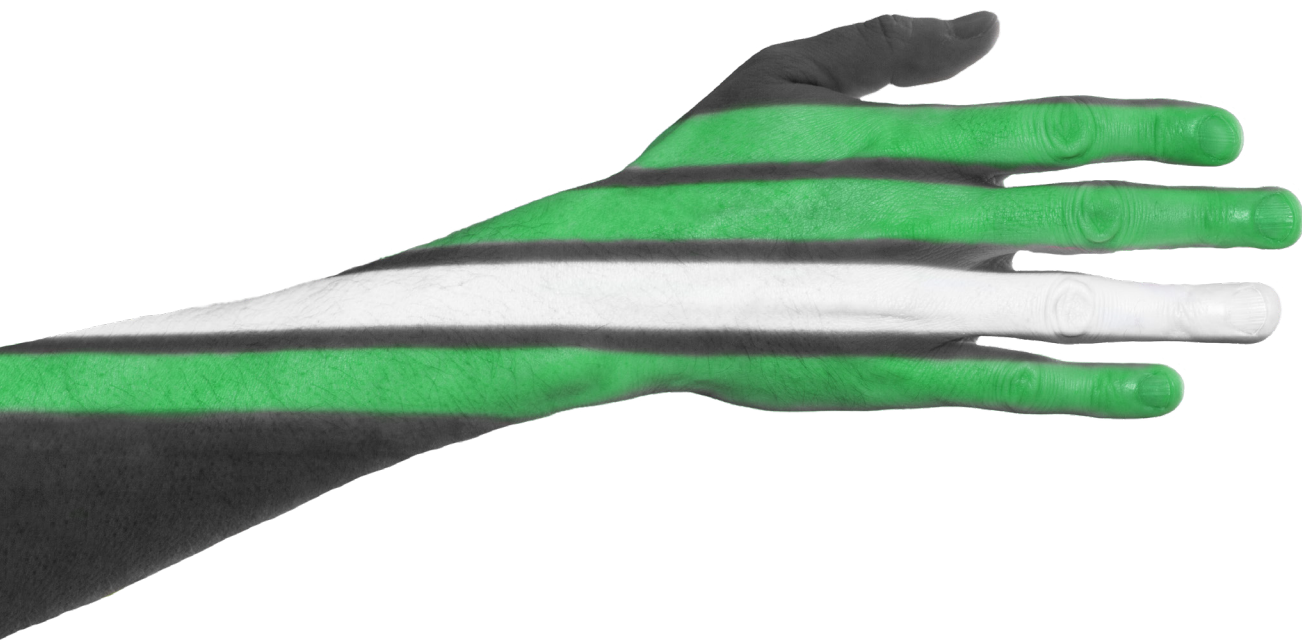


**s-peers**  
Success Story





### **Providing Customers with the Right Information – at the Right Time and via the Right Channels**

One of the leading Swiss insurance companies (more than 4000 staff members) is transforming its Campaign Management – so far embedded very statically in CRM – into a dynamic, more effective and automated CRM. The objective for the future hereby: Offering products to customers they really need – always in an individual and a personalized way. For this purpose, interactions with customers are now controlled across the complete customer relationship via different channels (incl. precise tracking of the results).

Supported by s-peers, the company has created a platform which pools various applications with regard to customers' activities and master data very efficiently. This includes e. g. contract data, information about sales organization or demographic and geographical data concerning the policy holders.

Now thanks to this reliable and homogeneous information base, the insurer can complement the classic customer segmentation with current details regarding the customers' individual life situations. But this does not mean applying averages to customer segments: Instead, the aim is putting more emphasis on each single customer and achieving an individualization. Thereby granularity is increased with regard to perspective and approach. Considering the different events in a customer's life, requirements can be derived and matching offers can be made proactively. This is carried out in a completely data-driven and fully automatic way. On the one hand, the intention is to increase the acquisition rate considerably via the message's high relevance for the customer. At the same time, customer loyalty, interaction and satisfaction are to be enhanced while a reduction of the process steps is achieved by automation.

**Precise. Sound. Straightforward.**



## The Task

The insurance company provides a total of 1.9 million customers with a portfolio of 90 products which partially demand much explanation. In the future, these products are to be marketed to matching customers in a more targeted way with the aim of creating even more trust and security via specific offers.

However, nowadays the so-called Customer Journey within the insurance business is influenced significantly by digitalization and changes in customer behavior. Simultaneously, competition and other (niche) providers increase the pressure on the market.

These challenges can only be met successfully by a better understanding of the market and of the individual customers. In addition, there is the demand for simplicity and clarity. The digital tools imply the expectation to be able to comprehend information and history always smoothly and coherently. Consequently, interlocking and therefore integration of the single Touch Points to the customer become vital.

Due to a shared data layer in form of an Enterprise Data Warehouse, master data and activities regarding the individual policy holders could already be stored after being provided by the different applications resp. databases.

But at the same time, there still were big deficits in terms of Process Level – which was, especially in the field of Campaign Management, very fragmented and marked by many system gaps/discontinuities.

Thus the setup of single marketing activities resp. campaigns took at least three weeks and was characterized by much effort. Also the triggering of the different channels was carried out mainly by manual imports. Moreover, it was not possible to trigger off further steps via a task (e. g. proactive triggering of an offer after a life event in form of a real estate purchase was reported).

The existing model was no longer acceptable to this extent. As a consequence, the insurance company decided to team up with s-peers to start a promising project for a digital, event-driven marketing and distribution concept.

## The Project

### Requirements

- Creating a central data storage for Campaign Management
- Ensuring data quality (reduction of doublings, obsolete data, coordination effort and other error sources)
- Automated identification of customer needs on the basis of life events
- Automated campaigns
- Control via different communication channels
- Coordination of synchronization points with more than 13 other projects

### Solution

- Setup of a technical infrastructure based on SAP CRM, SAP EDWH and SAP HANA, complemented by the modules SAP Hybris Marketing and SAP Predictive Analytics
- Preparation of operative campaigns in the operative CRM system on the basis of practical business events (e. g. relocation, price calculation) plus implementation, analysis and integration into the campaign process
- Development of i. a. predictive data models on the SAP HANA platform by use of analytical functions
- Integration of these models (Cross-Selling, Up-Selling, Churn) into the campaign process for efficient embedding and use during practical campaigns
- Development and creation of a basis for the generating of triggers (data, infrastructure) and corresponding rules
- Development of the respective offering story, based on the findings made (e. g. birth of the first child, career entry)

### Technologies

- SAP BW: Data supplier
- SAP CRM: Data supplier and platform for customer interaction
- SAP SLT: Real-time replication of data
- SAP HANA: Native data modelling / platform for Trigger-Based Analytics
- SAP Predictive Analytics: Predictive modeling
- SAP Hybris Marketing: Campaign Management, linking of channels

»s-peers have convinced us as a flexible and an agile consulting provider. Their varied project and industry experiences plus their deep knowledge in SAP technologies did provide us with very valuable services.«

– Head »Reporting, Analytics & Big Data Products«

