

Salesforce CRM gives Allianz the edge in selling business insurance



“Salesforce CRM helps make our staff much more efficient in their day-to-day activities, while simultaneously helping managers to manage and underwriters to underwrite.”

— Allianz Insurance

Challenge

- :: Leading UK commercial insurance business was managing relationships with 2,000 brokers at a local level using fragmented sales and relationship management processes across 12 UK offices.
- :: Allianz’s aim was to increase sales growth and profitability.
- :: The company wanted to streamline operations to make better use of sales resources.
- :: Allianz wanted to move closer to the broker intermediary community.

Solution

- :: Allianz deployed Salesforce CRM Sales to 350 employees in 12 UK offices, creating a single, near-real-time view of business insurance target audiences.
- :: Salesforce CRM is used across a number of disciplines, including Broker Relationship Management, Quote New Business, and Development Management.
- :: A real-time broker relationship dashboard spans key topics such as call planning, meeting minutes, actions, the status on large cases, and new business prospects.
- :: In Quote New Business, Salesforce.com Consulting has been instrumental in the development of a customized dashboard highlighting real-time issues such as quote allocation, quotes in the market, won cases, net and gross strike rates, large cases, and status on prospects.
- :: Development Managers can score data quality, understand the extent to which the right brokers or contacts are being visited, and the degree to which contacts are being related to opportunities.
- :: The team has implemented scores of unique field, tabs and custom objects, largely themselves without support from the technical department.
- :: Salesforce.com Consulting designed and implemented a bottom-up Net Promoter.
- :: Allianz deployed a scoring system which manages customer satisfaction reporting and measurement in only 6 weeks.

Results

- :: Since using Salesforce CRM, the net strike rate (opportunity conversion rate) for underwriters has risen by 17.4% compared to what it was the year before.
- :: The gross strike rate for Business Developers is also a 10% improvement on 12 months previous.
- :: “Priority 1” opportunities have achieved a gross strike rate of 22.4%, which is twice the business average. And the volume of Priority 1 opportunities that have been closed has increased by 108 per month.
- :: As part of the bottom-up Net Promoter Scoring system, Salesforce CRM collects the data and provides a near real-time dashboard view of the situation across all 12 locations - accelerating management decision-making and enabling the company to more rapidly execute change management programs.
- :: A 90% log-in rate reflects the popularity and importance of the system.
- :: Allianz completed a highly successful 6-week roll-out to 12 offices and 350 users in the U.K.

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