



Summary

Customer profile

CONCORDIA Schweizerische Kranken- und Unfallversicherung AG is one of Switzerland's biggest illness and accident insurers. It insures individuals, families, companies and associations.

Current situation

Telemarketing activities were performed by external call centres. For reasons of quality and cost, CONCORDIA considered operating its own telemarketing centres in the future. It was hoped that a pilot project would provide the basis for this decision.

Solution

A CONCORDIA Telemarketing Centre was created in Lausanne as a pilot project. Its technical foundation is Microsoft Dynamics CRM 4.0. The most important innovation was the creation of a seamless connection between the call centre solution and the CONCORDIA IT infrastructure to enable more end-to-end processes.

Results

As the call centre agents can now access the Outlook calendars of the external sales force directly, appointments with customers can be made more efficiently. There are fewer postponements and the external sales force benefits from better time management. At the push of a button, managers can now generate reports and evaluations for measuring performance.

More meetings with new customers thanks to Microsoft Dynamics CRM 4.0 as a call centre solution

As part of a pilot project, the Swiss illness and accident insurer CONCORDIA has successfully realised its own call centre (telemarketing centre) based on Microsoft® Dynamics® CRM 4.0.

«We were able to generate more and far better customer contacts with a huge reduction in time and cost.»

Heinz Lerch, project manager at CONCORDIA Schweizerische Kranken- und Unfallversicherung AG

CONCORDIA Schweizerische Kranken- und Unfallversicherung AG relies heavily on telemarketing to acquire new customers. As part of a pilot project, the company wanted to check whether its externally managed telemarketing activities might not be better and more cost-effectively carried out in-house. As the insurer had already been successfully using Microsoft Dynamics CRM for its service provision and contract management for some time, the decision was made to realise the pilot call centre solution using this technology as well. With the support of Microsoft Gold Certified Partner and CRM specialist iTrust, it established the first CONCORDIA Telemarketing Centre in Lausanne. It quickly became clear that the seamless integration of the call centre solution into the existing IT landscape would optimise processes and save costs.

«We have far fewer meeting postponements because the call centre agents can now access the Outlook calendars of the external sales force directly.»

Heinz Lerch, project manager at CONCORDIA Schweizerische Kranken- und Unfallversicherung AG

Partner



iTrust is a Microsoft Gold Certified Partner whose more than 50 employees serve large customers from a variety of sectors and around 450 SMEs, mainly in the Central Switzerland and Zurich regions. In the field of CRM, iTrust specialises in Microsoft Dynamics CRM 4.0. iTrust supports companies across the board – from consulting to defining requirements and processes and implementing the finished solution.

iTrust

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Customer profile

With more than 700,000 policyholders, CONCORDIA Schweizerische Kranken- und Unfallversicherung AG is among Switzerland's largest illness and accident insurers. Some 1220 full- or part-time employees work at its head offices in Lucerne, in the Service Centre and in its 300 or so agencies and branch offices. CONCORDIA offers compulsory health insurance, additional health insurance policies and accident insurance to individuals, families, companies and associations.

Current situation

Telemarketing plays an important role at CONCORDIA. As part of its concerted marketing campaigns, potential new customers are contacted by phone with the aim of arranging an advisory meeting with a CONCORDIA sales representative. As the company did not have its own infrastructure, this task was performed by external call centres. To clarify the cost of an in-house solution and explore optimisation potential, it decided to set up its own telemarketing centre in Lausanne as a pilot project.

Solution

The newly implemented call centre solution, which is supported by CRM specialist iTrust, is based on Microsoft Dynamics CRM 4.0. Heinz Lerch, project manager at CONCORDIA: «With Microsoft Dynamics CRM 4.0, we deliberately chose a standard solution that we can quickly and easily roll out at other locations following a pilot phase. The decision was made all the easier because we had already successfully used Microsoft Dynamics CRM for some years for service provision and contract management. It was also important to us that the solution could be later extended to cover more than just call centre functions, so creating a more end-to-end CRM system.» The pilot solution was

externally hosted to relieve the burden on the company's own IT resources and gain time. During the six-month test phase running from spring to summer 2009, around 20 telemarketing agents worked in the new CONCORDIA Telemarketing Centre in Lausanne.

Results

The biggest advantage of the internal telemarketing centre based on Microsoft Dynamics CRM 4.0 proved to be its seamless integration into the CONCORDIA IT landscape. Previously, the appointments delivered by the external call centre had to be manually distributed to the individual sales force members, which not only generated a lot of administrative work, but also occasionally resulted in meeting clashes. With the new solution, the telemarketing agents can call up the Outlook calendar of the assigned sales representative directly and enter the appointment there. For each appointment the system automatically generates a fact sheet containing the customer's key details. The agent, supported by the system, calls up this information. If the meeting does not go ahead, the reasons are detailed in a report. Heinz Lerch is extremely satisfied with the course of the pilot project: «We were able to generate more and far better customer contacts with a huge reduction in time and cost. At the push of a button, the integrated tools can carry out precise evaluations and performance measurements.» In view of its good experiences, Concordia is now considering whether to introduce an in-house telemarketing process for all areas in which it does business.

Key data

Project duration Spring to summer 2009

Connected workstations 20

Improvements

More and better contacts in new customer acquisition; marked time and cost savings thanks to automated end-to-end processes; fewer appointment clashes and better time management for the external sales force; better preparation of sales representatives for their meetings; faster and quicker access to key figures; reliable performance measurement of telemarketing agents and the sales force; easier operation and lower training outlay; seamless integration into the Microsoft® Office environment; simple and fast changes to input screens; extremely future-proof, high level of expandability and flexibility thanks to standard technology.

Software and Services

- Microsoft Dynamics CRM 4.0
- Microsoft Office
- Microsoft Windows Server
- Microsoft SQL Server