

## Integrated eCommerce Strategy Helps Retain Brokers and Agents

### **The Situation**

A leading service insurer, Swiss Life in Germany was eager to strengthen its channels to the marketplace by fortifying support for its brokers and multiple agents. The intent was to provide centralized services using new technologies and an integrated multi-channel strategy. Unable to achieve this goal, Swiss Life looked to Capgemini to help it develop a solution to improve its sales processes and broker retention practices.

### **The Solution**

Capgemini, in cooperation with Swiss Life, created an Internet-based service portal for the sales partners and formulated a corporate-wide e-business strategy. Sales measurement tools, a communication and transaction platform, and a holistic content management system were co-developed with Swiss Life to ensure the technologies met their specific needs.

### **The Result**

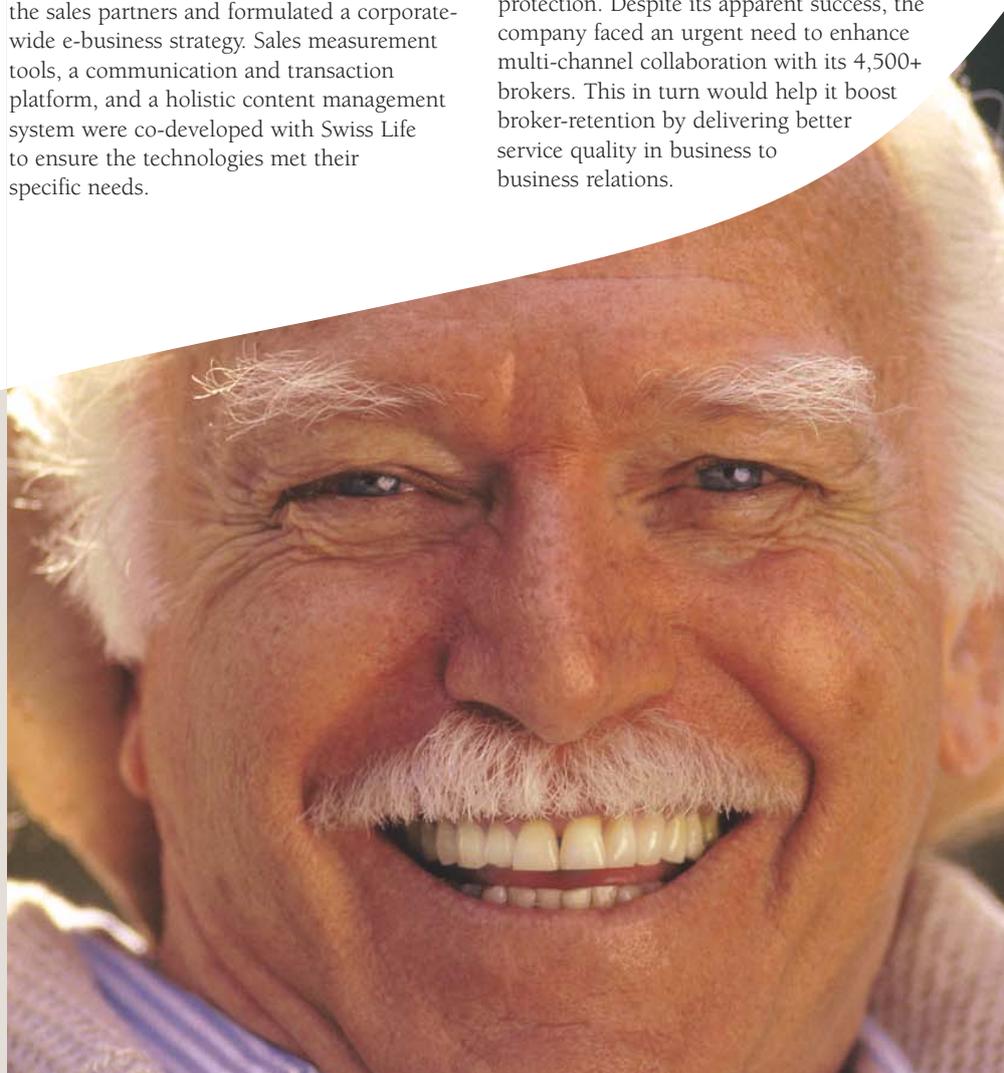
With a company-wide competence centre in operation, Swiss Life was able to more fully support its sales partners and clients. Streamlined processes, a user-friendly service portal, and improved access to shared information helped the corporation increase its efficiency and more effectively meet customer needs.

### **How Swiss Life Germany and Capgemini Worked Together**

Swiss Life in Germany provides its clients products in the areas of long-term savings and protection, with a special focus on risk protection. Despite its apparent success, the company faced an urgent need to enhance multi-channel collaboration with its 4,500+ brokers. This in turn would help it boost broker-retention by delivering better service quality in business to business relations.

**“Tiny budgets boost creativity!”**

**— Rolf Louis, Sales Director  
Swiss Life Germany**



Capgemini began its collaboration with Swiss Life by evaluating the company's failed Internet initiatives and sporadically managed knowledge practices. A joint team was established to formulate an e-business strategy and devise tactics for improving Swiss Life's service quality and sales program.

In the past, Swiss Life's e-commerce operations in Germany were uncoordinated with required competencies scattered over the company. Capgemini helped the insurance company set up an e-commerce department, manage interims, integrate its knowledge and information systems, and incorporate analysis and measurement tools.

After establishing a new Internet-based service portal for the sales partners, Capgemini created a new information, communication, and transaction platform (WebOffice) in less than eight months. Based on the new Internet architecture, Swiss Life was able to enhance its access to product and

product-related information through the utilization of inventory queries, various Java-based tariff calculators, and functionalities customized for marketing and sales.

To help differentiate the sales partners, the project team developed an authorisation model based around a centralized user administration. Capgemini also worked closely with Swiss Life to implement organisational changes and consolidate company-wide requirements management practices.

WebOffice, coupled with CRM best practices, helped Swiss Life in Germany transform its infrastructure and significantly streamline its back office operations. Within the greater global Swiss Life enterprise, executives regarded the project for Swiss Life as the most successful e-business project so far in terms of cost/benefit ratio.



## About Capgemini and the Collaborative Business Experience

Capgemini, one of the world's foremost providers of Consulting, Technology and Outsourcing services, has a unique way of working with its clients, called the Collaborative Business Experience.

Backed by over three decades of industry and service experience, the Collaborative Business Experience is designed to help our clients achieve better, faster, more sustainable results through seamless access to our network of world-leading technology partners and collaboration-focused methods

and tools. Through commitment to mutual success and the achievement of tangible value, we help businesses implement growth strategies, leverage technology, and thrive through the power of collaboration.

Capgemini employs approximately 60,000 people worldwide and reported 2003 global revenues of 5.7 billion euros.

More information about our services, offices and research is available at [www.capgemini.com](http://www.capgemini.com).

In collaboration with



Approved by Klaus G. Leyh, Swiss Life  
and Detlef Wappenschmidt, Capgemini