

Capitalizes on a customer relationship management tool to refine its commercial offers

To reinforce its presence in the individuals market, the Henner Group, major player in the domain of insurance, uses the Coheris CRM software.

The objective is three-fold: to reduce processing time, to obtain traceability of sales contacts and to improve the conversion rate of opportunities.

In figures...

The Henner Group:

- 873 associates
- Turnover: 93 Million Euro
- Premiums managed in 2008: 735 Million Euro

Context

To reinforce its presence in the individuals market by establishing a call centre and a CRM solution

Challenges

To find a multi-channel CRM platform sufficiently open for integration with the business applications of the Group

Solution

- **Coheris CRM 4.0**
- **Coheris DQM** (Data Quality Management)

Benefits

- Reliable and accessible database of customers and prospects
- Better service quality
- Unified and global view of the customer
- Increased autonomy of consultants
- Better business management

Second largest group insurance broker in France with a consolidated turnover of 93 Million Euro last year, the Henner Group developed from the Garantie Médicale et Chirurgicale (GMC).

"Our mission is to meet all the requirements of our customers - individuals or companies - with regard to insurance: health, provident fund, funerals, sport, retirement savings, payroll savings..." declares Axelle Cousin, Project Director - Individual Development within the Henner Group.

Customer-oriented strategy

Mid-2007, the Group decided to reinforce its presence in the individuals market. A decision that involved establishing a call centre and a CRM solution.

"We did not have a database of prospects and the before-sales information was stored in different Excel files. At this level, we were unable to utilize the information fully and boost our customers" summarizes Axelle Cousin.

We invited bids to select the best players in customer relationship management.

"In our specifications, we wanted a CRM solution that contributes functionalities indispensable to establishing a unique and integrated view of our customers. In addition, this solution had to be sufficiently open for integration with our business applications and with an estimate simulator" states the Project Director. After an analysis of different solutions, the management selected Coheris CRM.

"Coheris meets its commitments, both on the technical and human plane. In fact, technically, the Coheris CRM software suite combines the most advanced functionalities with regard to operational and analytic CRM. On the human plane, we were responsive to the suggestions of the before-sales team that assisted us during the entire project" says Axelle Cousin.



Axelle Cousin
Project Director
Henner Group

CRM that meets business challenges

In January 2008, the project started with the sales module. The first axis consisted in developing the interfaces with the management system of the Henner Group; the objective being to obtain customer records by accessing information from the management application.

"This interface developed jointly with the Coheris teams is important. It provides a traceability of all events linked to an insurance contract: cancellation, payment, etc." explains Axelle Cousin.

Second axis: To develop the multi-channel aspect and in particular to process requests received from the website.

The third axis is strategic for the group because it involves integrating the CRM with a simulator of offers. "To remain competitive, we must offer our customers the possibility to receive a real time estimate" states the Project Director.

And finally, the last axis consisted in developing an interface with the Jetform software for publishing customer offers.

Eight months later, Coheris CRM was deployed on 20 user machines of which 7 are at the call centre level.

"We handle close to 5000 calls per month. With Coheris CRM, consultants could avail of the full customer history. They can adapt their discussions and offer individuals insurance policies that correspond the best to them in terms of services and budget."

Finer analysis of the business

The Henner Group today is in the position to appreciate the initial benefits provided by the Coheris CRM solution. The first of them concerns business management. "In future, we will know the exact number of estimates resulting from our website, the source of requests and sums to even respond within the shortest period" reports Axelle Cousin.


In addition, the customer appreciates the possibility of simulating a tariff and knowing his projected reimbursements in real time. "In fact, we can enter the expenses in our information system and indicate to the customer the amount of his reimbursements."

Another benefit: a unified view of customer data. "It helps facilitate the tasks by ensuring a follow-up of customer events and this even if an associate is absent" notes the Project Director. And adds: "Earlier, data entry was done twice. Today, data is entered only once and we are assured of reliability thanks to the Coheris DQM software (Data Quality Management). This tool cleans, deduplicates, profiles and standardizes fields from the database to obtain perfectly valid and useable information"

In the long run, the Group envisages capitalizing on the Coheris CRM solution to carry out marketing campaigns for additional sales. "We have a powerful solution that enables us to send customized messages, adapted to the profile of each customer." concludes Axelle Cousin with satisfaction.

BENEFITS

- RELIABLE AND ACCESSIBLE DATABASE OF CUSTOMERS AND PROSPECTS
- BETTER SERVICE QUALITY
- UNIFIED AND GLOBAL VIEW OF THE CUSTOMER
- INCREASED AUTONOMY OF CONSULTANTS
- BETTER BUSINESS MANAGEMENT
- UN MEILLEUR PILOTAGE DE L'ACTIVITÉ



Personne: COUSIN Axelle (Hen.) (Crm: 98642)

Civilité: Mme | Nom: COUSIN | Prénom: Axelle | Genre: F
 Date Naiss.: 10/05/1973 | Nationalité: FRANCE | N° AM: | Décédé:
 N° Hennernet: | Type: Prospect CRM | Souscripteur: | VIP:

Contrats | Paiements

Détail | Coordonnées | Personnes liées | Actions | Données de Campagne

Qualification

Sit. familiale: Non renseigné | Pays d'expat.: ETATS-UNIS | Exclure campagnes:
 Sit. Pro.: Salariée | Langue: FRANCAIS | Exclure mailing postaux:
 Régime AM: Catégorie 1 CFE | CSP: Non renseigné | Exclure campagnes tél.:
 Origine: Autre | UG: | Circularisation Hennernet:
 Entité: |

1 Opportunités(s)

Sel.(0)	N°	Risque principal	Offre	Date d'adhésion souhaitée	Emetteur	Statut
<input type="checkbox"/>	PTF2009050540	Santé	b-Fivilières 7	01 06 2009	Axelle Cousin	En-cours

1 Evénement(s)

Sel.(0)	N°	Type	Statut	N° de contrat	Date de création
<input type="checkbox"/>	25220	EVENEMENT/Demande d'information/Demande de plaquette produit	En cours	x	29/05/2009

Opportunités | Evénement

« Customer record »