



## Allianz Belgium Boosts Distribution Relationship Management of Brokers

**Customer:** Allianz Belgium  
**Web Site:** [www.allianz.be](http://www.allianz.be)  
**Number of Employees:** 1.100  
**Country or Region:** Belgium  
**Sector:** Financial Services - Insurance  
**Partner:** Travi@ta

### Customer Profile

Allianz Belgium—formerly called AGF Belgium Insurance—is active in life and non-life, health, personal, and commercial insurance. It works primarily through brokers..

### Software and Services

- Microsoft Dynamics
- Microsoft Dynamics CRM

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Vincent Jacobs, Customer Focus Manager, Allianz Belgium

Leading insurer Allianz Belgium wanted to improve its distribution relationship management with the brokers who sell its insurance products while boosting the quality of information and reducing costs. The firm replaced its outdated broker database for customer relationship management with an integrated application using Microsoft Dynamics® CRM software. As a result, Allianz Belgium is improving sales and providing a better service to brokers.

### Business Needs

Allianz Belgium is one of the main players in the Belgian insurance and financial services market offering its products and services primarily through independent professional brokers. Previously called AGF Belgium Insurance, the company was re-branded Allianz in 2007 and employs about 1,100 people. The company sells life and non-life, health, personal, and commercial insurance policies.

With brokers as its primary distribution channel, Allianz Belgium wanted a solution that would support the brokers'

day-to-day business, encourage up selling and cross selling, and motivate its staff to become more effective at managing their relationships with brokers. Vincent Jacobs, Customer Focus Manager, Allianz Belgium, says: "Previously, our broker information had limitations. There were difficulties for both our relationship managers and reporting because we lacked any integrated application. The previous system could only be used online through a local area network and consultation was limited to sales." Allianz Belgium set several immediate objectives for any new system. These

included better sharing of information, reduced administration burdens for Broker Relationship Managers, automated reporting instead of manual systems, and the ability to find all broker commercial information in one place.

Jacobs says: "In today's highly competitive business environment, one of the fundamentals is to know your brokers. It needs to be done with a user-friendly customer relationship management tool where information can be shared and the functionality is driven by management and sales. This approach leads to cost reduction, better profitability, and, ultimately, improved service from brokers to customers."

## Solution

Working with award-winning Microsoft® Gold Certified Partner Travi@ta in Belgium, Allianz Belgium implemented and customized Microsoft Dynamics CRM software for 80 Broker Relationship Managers and their business processes. It extended use to administrative departments to provide valuable information to the sales force. Microsoft Dynamics CRM has significant strengths providing a rich platform for distribution relationship management, including:

- Ease of use with a familiar look and feel, especially to users of the Microsoft Office suite of products.
- Rapid to implement and flexible because it can be used online and offline, unlike the previous solution.
- Adaptable and scalable with the ability for customization without the need for intervention by IT consultants.

Wim Geukens, Managing Partner at Travi@ta, says: "The major challenge was to convince the Broker Relationship Managers to use the CRM system and abandon their previous, largely manual, approach. We even used incentives if they responded to prompts alerting them to use the more advanced features. One of our aims was to provide the Broker Relationship Managers with a 360-degree view of the broker using all the data available."

However, change management for a traditional insurance provider with a long history was by no means easy. Geukens adds: "When we started our engagement, there were some relationship managers still relying on paper-based records who were not used to IT tools."

## Benefits

Allianz Belgium has significantly improved the quality of its distribution relationship management of brokers and the technology is supporting enhanced sales despite tough competition. Broker Relationship Managers are able to form stronger bonds with the brokers they serve, and better pursue and capture business together. In turn, brokers value the improved services they receive from their contacts at Allianz Belgium. Jacobs says: "With Microsoft Dynamics CRM, we have a distribution relationship management toolset that is helping us maintain and improve market information. Our brokers are getting new product information to their customers faster and taking advantage of better management from our relationship managers."

- **Specific CRM solution for insurance industry.** With expertise from Travi@ta, Allianz Belgium has developed a toolset on Microsoft Dynamics CRM and retains information centrally.
- **Information collated in one application.** Previously, information relevant to relationship management of brokers was scattered in disparate databases using outdated software, but is now accessible in a single application.
- **Control over the whole relationship with the broker.** Relationship managers can oversee the whole relationship with the broker at the click of a mouse. They provide brokers with relevant sales leads, marketing campaigns, news alerts, and new product information that match the needs of the customer base.
- **Support for both connected and disconnected mode.** Whereas previously relationship managers could only access broker information online, the new CRM technology operates both online and offline with automated reporting.
- **Reduced administrative burden for sales executives.** The lack of an integrated Broker Relationship Management system was a major handicap, leading to a large amount of time being wasted by relationship managers on repetitive administration. Jacobs says: "Our people have been freed to spend more time on direct contact with the broker because many processes have been automated and manual intervention is no longer necessary."