



Success Story



SwissLife

CAS genesisWorld

CRM/XRM for small and
medium-sized enterprises



CAS
SOFTWARE

Reliable by the customer's side

For about 150 years, Swiss Life Germany has been supporting people in their endeavors to live a financially independent life. The company is one of the most experienced solution providers in Germany for everything relating to insurance, provision, and asset services. Their core competencies include i.a. occupational disability insurances and company pensions. At Swiss Life, individual customer needs come first and reliability is key in their often long-lasting customer relations.

With CAS genesisWorld, the insurance company from Hannover plays it safe in their CRM game. In Hannover, the Swiss Life employees provide customer services for the end customer. Here, CAS genesisWorld is an important tool for quality assurance (QA) and enables the ideal reclamation management.

CRM/XRM for complex processes

"The processing of reclamations is a complex task," explains Torsten Pölig, QA & HR Manager. "More often than not, it's about a lot of money for our customers. They need to be sure that we can process their issues diligently and with care. We initiate precisely-defined decision paths to check their reclamation. Each job is professionally analyzed and we gather statements of the involved parties. What's important: as a financial service provider, Swiss Life needs to adhere to strict regulations. Everything needs to be revision-proof, that is, no step in the process can be changed retroactively."

Strong digital culture

"We were searching for a powerful solution, partly because Swiss Life aims to strengthen digital teamwork in companies," reports Pölig who was responsible for the



SwissLife

Industry

Financial consulting and insurance provider

Objectives/Requirements

- Powerful quality assurance, reclamation, and customer management
- Digital support to maintain and optimize long-standing customer relations
- Display of the entire communication management in one solution with customer services in mind, revision-proof and with conclusive reports
- Display, automation and optimization of internal processes
- Integration of self-developed programs Slot and EVS containing several hundred million data records

Benefits and advantages

- High transparency including job documentation in compliance with rules and data protection regulations
- Safe customer and interaction data management due to multi-level rights system
- Reduced workload and more time for customer needs due to automated processes with pre-defined grounds of appeal, linked documents, deposited sample letters, and so on
- Informed decision making thanks to well-structured analyses and reports including intelligent filter and selection functions
- A current overview of all customer data paired with seamless data exchange between integrated systems



program switch. We were searching for a way to display the entire communication management in case of a critical query in one solution: centered around customer service, revision-proof, and with the option to create conclusive reports.

All in one solution

"After an extensive review of four systems, we decided on CAS genesisWorld and the certified IT service provider C&H Gesellschaft für Informationstechnologie mbH. The deciding feature was that this CRM/XRM solution offers the perfect display of reclamation processing and an overview of all necessary steps. "We are able to record all customer data, define grounds of appeal, link all documents, as well as deposit and edit sample letters. All processes are documented in compliance with existing regulations," Pölig explains.



» With CAS genesisWorld, we are keeping an overview and can systematically improve our customer services. «

Torsten Pölig,
QA & HR Manager

CAS genesisWorld

Project data

- CAS genesisWorld Premium
- Slot and EVS interfaces

Customer

- Swiss Life Select Deutschland GmbH, www.swisslife.de
- Leading provider of finance and provisions service solutions
- Founded in 1857
- Operating worldwide, more than 7,500 employees

Project partner

- C&H Gesellschaft für Informationstechnologie mbH, www.cundh.com

CAS genesisWorld

- Professional customer management
- Supports internal processes, increases efficiency
- Mobile CRM solutions with CAS SmartDesign for smartphones, tablets and browsers
- Very good price-performance ratio
- Flexible, easy to integrate, extendable
- Established product – winner of several awards

All contacts and notes are available to every employee. CAS genesisWorld also fulfils specific functions. For example, you can deposit payment methods in case of ex-gratia solutions, e. g. financial liability insurance applies.

Keep an overview thanks to interfaces

The interfaces programmed by C&H provide seamless integration with the existing, self-developed programs Slot and EVS. Thereby, daily processes are much easier, Pölig emphasizes: "Before, we had to manually record data. Now, I enter my customer ID into the CRM system and CAS genesisWorld automatically gathers all relevant data, from customer data, to contract data, to other job data, from all the other systems." Using the report module, our QA employees analyze the individual jobs: how was the

customer's experience during the reclamation process? Was their critique justified and what were their grounds of appeal? Is there need for action in certain areas? "With CAS genesisWorld, we are keeping an overview and systematically improve our customer services with customer-centricity in mind," summarizes Torsten Pölig.

About Swiss Life

Swiss Life Germany is one of the leading providers of finance and provisions service solutions. and is part of the Swiss Life Group based in Zurich. Worldwide, the group employs about 7,500 employees. On the German market, Swiss Life is established with multiple brands and offers customized solutions relating to insurance, provision, and asset services to private and corporate customers.



More testimonials:
www.cas-crm.com/references

Find out more



A SmartCompany of CAS Software AG

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