

Sanitas Krankenversicherung chooses BSI CRM for customer service

Sanitas is upgrading its customer service and has chosen BSI CRM for its 360° customer view and for its professional lead and complaint management.

Baden, March 17, 2014 – With around 800,000 persons insured, Sanitas Krankenversicherung is among Switzerland's largest health insurance companies. To better serve their existing customers and to be there quickly and dynamically for potential new customers, Sanitas chose BSI Business Systems Integration AG as its CRM partner. Customers will profit from improved service quality in the future. Staff will experience fewer system changes, combined with more process guidance, improved lead identification and a comprehensive customer view.

As a leading health insurer, Sanitas offers appropriate products and insurance solutions for any life situation. As such a long-term partner, Sanitas must remain agile and develop innovative services at the cutting edge. Sanitas expects the same from its partners. "For our customer relations project we sought a modern and flexible solution which efficiently and sustainably supports our plans," according to Emanuele Diquattro, Head of Business Engineering & ICT at Sanitas.

The health insurance market is extremely competitive. Sanitas seeks to differentiate itself from the competition with better and faster service. Customer contacts shall be used to maintain existing customers. BSI CRM offers the 360° customer view in Phase 1 towards this end. Furthermore, by September the initial important processes, including complaint and lead management, will be depicted in BSI CRM. Sale opportunities can be entered and assigned correspondingly. "Around 1.5 million customer contacts by phone, e-mail, the Web and letters equal 1.5 million opportunities for a positive customer experience. We want to take advantage of this by serving our customers better and more individually using the comprehensive customer view and to be able to more specifically indentify leads. Our staff can work even more efficiently and will be guided through the process in the CRM. This also provides us with detailed evaluations and identification of the reasons for calls. If we know why customers call, then we can, in turn, improve our products and services.

Customer feedback is therefore crucial for the continuous improvement of what we offer," according to Emanuele Diquattro.

Close to the standard

"Sanitas is sticking close to the BSI CRM standard and is integrated in the central peripheral systems, such as the standard ERP system Syrius and the eGate sales system developed by Sanitas. In the future, employees will be able to switch from the BSI CRM interface to another system in a single process step. This keeps the process thoroughly transparent and evaluable. On the other hand, data from the peripheral system flows back to the CRM through online services. This promotes efficiency and real-time information for all employees," stated Thomas Lindauer, BSI Project Manager.

The BSI Team was able to put its openness and flexibility to the text in a proof of concept – with great success: "BSI is – like us – rapidly and flexibly in motion. The chemistry was right among the team members. That is an important element for the success of the project. We want to be a pioneer in Switzerland with our customer-oriented CRM solution. BSI gave us the feeling that they would be able to optimally support us in attaining this goal," stated Hubert Sidler, Project Manager for Sanitas.

Agile project methodology

The CRM implementation is taking place at Sanitas according to agile project methodology. This involved dividing a project into many small steps (sprints). "The great advantage is that our customer sees what we are working on at all times and can make changes and set priorities and have a say in the process. Especially the employees who will be working with the new system in the future can provide valuable inputs in this phase," according to Thomas Lindauer. The aim is for the company to be able to already profit from the developments in Phase 1 as of September. Phase 2 will then begin, in which the team will focus on the upgraded lead and campaign management.

BSI already works with service insurance companies as customers, including Basler Versicherungen and ERGO Direkt Versicherungen. With the solution for Sanitas, BSI plans to upgrade the standard to be able to offer other health insurance companies a good, sophisticated standard solution. "Towards this end, we will upgrade the product BSI Insurance with a new module specifically for health insurance companies," explained Thomas Lindauer. He very much appreciates working with Sanitas: "Sanitas is a company that unbureaucratically and consistently focuses on its customers and employees. This is enhanced by the fact that those of us on the project team have a special connection to our customer: We are all customers of health insurance companies and can



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personally relate. An innovative solution that clearly provides added value to customers, employees and the company alike is something that means a lot to us,” according to Thomas Lindauer.

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We develop software at the interface to the customer. BSI CRM, BSI’s core product, creates simple processes with a 360° view in sales, marketing and service. With BSI Contact Center, BSI Retail, BSI Insurance, BSI CRM as well as special solutions, we offer focused products for any industry or task. The use of open technology (Java/Eclipse) guarantees efficiency, individuality and future security. Over 70,000 users profit from our software daily in companies including ABB, Actelion, ERGO Direkt, Lidl, PostFinance and Walbusch. Behind it stands the hard work of 190 engineers and project managers in Baar, Baden, Bern, Frankfurt am Main, Munich and Zurich. And anywhere you need us to be.