

Next-generation broker support

Gothaer optimizes its support for partner sales with BSI's Broker Relationship Management (BRM) solution

Baden, 9.7.2019 – **Gothaer is going live with a centralized information and management tool for its sales partners: The BSI CRM-based software for professional sales partner support (BSI BRM) won Gothaer over with its attractive user interface, extensive selection of options, effective sales and (marketing) campaign management, and forward-looking technical requirements. In addition to end customer support, Gothaer will now also count on BSI as its CRM partner in the sales partner support area.**

Gothaer is optimizing the support it offers its sales partners (including brokers, multiple agents, associations, and pools): It is retiring its legacy application and launching BSI BRM, the Broker Relationship Management solution based on the BSI CRM solution. "Our previous partner support application had age-related technical, functional, and optical limitations and allowed the implementation of business requirements only to an inadequate extent," explains Sebastian Kohlhaas, Project Manager in charge at Gothaer.

To meet the business needs, legal requirements, and expectations of employees, Gothaer selected a new BRM solution that, once launched, will be used in partner sales. It will potentially also be used in exclusive sales (exclusivity) in the future. "In this context, our sales partner is the customer we want to support as best as possible. Our goal is to ensure customized support. Even though in this first phase, we are launching the new solution only for partner sales, the process mapping of all sales partners provides added value in many ways," adds Sebastian Kohlhaas.

Customer and sales partner support from a single source

Gothaer was already familiar with BSI through its CRM system for personalized customer service. As part of its evaluation of a new sales management system, the company performed a preliminary study and rated potential providers in terms of the range of features and user-friendliness of their solutions. "Not only is the BSI BRM solution a replacement of the old system, but it is also the most suitable solution for us in regard to future goals and feature expansion," says Sebastian Kohlhaas. Other aspects that spoke for the selection of BSI were the infrastructure with the common CRM platform – which is intended to link the end-user view with the sales partner view in the future –, as well as the dedicated team that was already very familiar with Gothaer's know-how, technology,

interfaces, and centralized systems. "I have only good things to say about the excellent collaboration we have had with BSI – both in technical and project terms. This was clearly one of the reasons why we have been able to implement the project as quickly as we have," explains the expert, Sebastian Kohlhaas.

The legacy system will be discontinued in July of 2019. Compared with the past, the entire data flow will then be automated. There will also be features such as "News," individualized work views, the linking of files and documents, and the simplified selection and search function. From then on, approximately 250 sales partner employees and 700 employees in specialist departments will be using either all BSI BRM functionality or those features that are relevant to them.

The overarching goal for the future calls for linking the CRM and BRM solutions. The current focus is on partner sales, key figures, the efficient use of marketing tools, as well as the dismantling of stand-alone solutions. "We are very excited to now be supporting Gothaer's objectives with BSI Ocean as well. The solution's proximity to the standard, the close collaboration, and the values we share were key success factors," explains Sebastian Louis, BSI project manager.

Links: www.gothaer.de www.bsi-software.com/brm

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