

## Success Stories: Alecta

# With 1.6 million customers, it has to be right from the start!



*Alecta began using **Caesar webSales** as a platform for automation of its marketing processes.*

*Alecta then integrated **Caesar webObjects** in order to be able to link its customer events and training sessions.*

*The next step is to introduce **Caesar webCRM** for around seventy customer relations managers.*

### Background

Alecta offers service pensions which are paid by the employer. It manages more than 400 billion SEK. Customers and owners include 27,000 companies and 1.6 million private individuals.

### Challenges

At the start of 2007 the service pension market will undergo some key changes. This partly involves a change in competition structure for service pensions, and partly a change in the service pension agreement itself, including the fact that the service pension coverage age is being lowered from 28 to 25. This will create more customer groups, and the needs and expectations from these new customers may also undergo changes.

In order to succeed, Alecta aims to establish a close relationship directly with the insurance policy holder. This means that it is necessary to gain greater awareness of what customers want.

The desire to increase the number of customers while facing greater mobility among existing customers requires Alecta to be more active on the market, which creates a demand for increased coordination and optimization.



*"Caesar CRM is a way for us to learn more about our customers' needs at a lower cost. This makes it possible for us to simplify operations for as many people as possible and carry on a dialog with those who are interested in doing so."*

*Fredrik Laufke, Head of Project Management, Alecta*

### Solution

The changes that Alecta hopes to make will have significant consequences for those working within each process. It has therefore been a pronounced strategy from the beginning to split the implementation into several phases.

Alecta started implementing Caesar in spring of 2004, and the first users started working with it a few months later. In the first stage, a number of marketing processes were introduced that have been completely automated. This controls, for example, who is to receive what information mailings and when. With so many policy holders, it has to be right from the start. During the first year, 270,000 letters were mailed. The documentation base for these was automatically generated through **Caesar CRM** and then matched with the complete letters, which were sent out to customers. All these mailings are administered by one (1) user.

The second stage was to introduce new processes from the External Activities department into **Caesar webCRM**, which was launched in 2006. Alecta conducts courses and seminars for both private customers and customer representatives from corporate customers. They create an event/course in **Caesar webCRM**, and then call up a target group, enter facts pertaining to the session, such as time, place, purpose, and who is holding the course. Everything is then integrated into their public customer web, so that when the customers register online, they are automatically registered in **Caesar webCRM**.

Afterwards it is possible to track results, figures, etc. In order for all of this to function, it is, of course, essential for information to be accurate, and several integrations have been carried out to update **Caesar CRM** with the most current insurance information.

In the third stage, further initiatives are now being taken to introduce **Caesar webCRM** for some 70 customer relations

managers working in Business to Business. This provides them with a simple way to carry out sales tracking and find new ways to increase sales.

It is important to segment and categorize customers. The new age groups, for example, will be areas of interest. Different customer groups shall be handled in different ways. At the same time, the number of system users will increase to about a hundred.

In order to make sure the project is constantly kept on the right track, there is an administration organization and a steering committee to handle daily operations and smaller developmental projects within each phase.

## Effects

**Caesar CRM** has resulted in several positive effects:

### 1. Less and simpler administration

Time and money are saved by coordinating activities; total annual savings amount to more than 2 million SEK.

### 2. Solid control over customer activities

Everything that takes place that concerns a customer activity is documented in one single place. This makes work less dependent on particular individuals so that processes can be seamlessly transferred from person to person.

### 3. Optimized customer communication

More is done directly by- and in the system, which makes for fewer gaps to fill in and faster response time.

Communication is also streamlined, since a larger part of the work can be done directly by the customer.



*Parts of Alecta's project group at Caesar Forum.*



Photo: Elena Kraskowski

*New customer groups will emerge thanks to the new service pension agreement.*

### 4. Powerful follow-up

**Caesar CRM** makes it possible to carry out follow-up on both a company- and individual level.

## Summary

The changes that Alecta wished to carry out will have significant consequences for those working in each process, and for this reason the decision was made right from the beginning to divide the implementation into several phases.

The first phase optimized mailings and cut down on administration.

The second phase improved control of customer events and training sessions.

The third phase is helping Alecta increase profitability by getting closer to customers and building a deeper awareness of their needs and expectations.

### In a nutshell

- Deeper awareness of customers' needs and expectations
- Simpler administration
- Annual savings of more than 2 m. SEK



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