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### Case study: US Allianz implements 'as quickly as possible'

Two years ago, US Allianz Investor Services, LLC, headquartered in Minneapolis, faced the challenge of implementing its own CRM system. The company had been outsourcing its customer service operations, along with a partner. But after a mutual agreement with one of its business partners, Franklin Templeton, to give up being the sole marketer and distributor of their product, the company had to seek out its own CRM system. Today, the company's Web site boasts "innovative financial products and excellent customer service."

US Allianz faced a hard, inflexible deadline when implementing its CRM system due to the agreement with Franklin Templeton, according to Shawn Spott, manager of business services at US Allianz. The company accelerated its RSP process to meet this challenge, he said.

"We required a sophisticated environment that would be flexible and highly customizable," Spott said. For their CRM requirements, which had to support a traditional call center and Web-based support, US Allianz chose Point Information Systems' TeamPoint and was able to put together a fairly short implementation project plan, according to Spott.

"Our goal was to implement as quickly as possible, without the bells and whistles we would want down the road," Spott said. US Allianz wanted its employees to start utilizing the software, and planned to rely on user feedback to improve the CRM software, he said. US Allianz has two main groups of users: its internal users, which are comprised of the call center and the sales and marketing departments, and its external users, which are the mobile sales professionals.

US Allianz needed a "truly wireless mobile solution," according to Spott. "Whatever package we picked, (our users needed) access to the solution, regardless of (the presence) of a phone line," he said.

TeamPoint had a lot of the functionality out of the box that US Allianz needed, according to Spott. It featured workflow and scripting functionality, with the robust ability to define business rule-driven workflows and scripts, he said. US Allianz's sales teams don't need to be led through the call center scripts, but do need to jump around from product information to legal information, which they can do quickly with these scripts, thus spending less time on the phone with each customer, Spott said.

The second part of TeamPoint that attracted US Allianz was the customization. TeamPoint has its own integrated development environment (IDE), which allowed US Allianz to put up its own screens, build its own functions and interface the system with Lotus Notes and Visual Basic applications, Spott said. "It gave us a really robust environment to develop in," he said.

"One of the reasons that the customization environment was important was that we wanted to support our own implementation," Spott said. "We didn't want to be tied into a long-term consulting relationship," he said. US Allianz has further customized its CRM software by integrating it into its data warehouse and its sales and production information. The company can identify trends, conduct targeted marketing campaigns, send its sales force updated data, and engage in proactive follow-up calls, he said.

So far, US Allianz has been very successful with its CRM implementation, according to Spott. The company releases updates to its software every two to four weeks, with small changes such as the ability to add or change fields, as well as larger enhancements, he said.

For its mobile users, US Allianz runs Synchrologic's software, which encrypts and compresses changes in the

Oracle database to SQL Anywhere, Spott said. US Allianz also uses Cognos' Impromptu for reporting, he said.

From start to finish, the implementation of TeamPoint went live in four months, with a couple of extra months tacked on before the mobile part of the CRM system was released, Spott said.

"CRM has become, because we pull information out of a data warehouse, kind of a unified portal," Spott said. For example, Spott didn't anticipate that the CRM systems would become a place to look up licensing information, but they have become just that.

"One of the things we found is that we've been able to leverage CRM in areas we never thought possible," Spott said. The project started out as contact management, but US Allianz is utilizing CRM to manage workshop activities, e-mail confirmations and conduct targeted marketing campaigns, he said.

Yet US Allianz has had some snags in implementing its CRM program, according to Spott. "The biggest problems we've had have less to do with software and more with a new initiative," he said. US Allianz had to implement their software before the staff that would use it had been hired, and the company had to make a lot of guesses and assumptions as to how it would be used, he said. Some of those assumptions were wrong, and when the software went live, significant modifications had to be made, he said.

"From our standpoint, we had a lot of success because we (implemented) in an accelerated fashion," Spott said. "While we had problems, we benefited because it didn't get caught in a committee. We were able to get the product out there because we kept the implementation team small," he said. The actual decision-making group consisted of two to three people, and by keeping the team small, the company was able to get the software out to users quickly.

"We're letting users drive (the software's development), instead of trying to spend a year in a vacuum," Spott said. "Now, a year later, we have pretty close to (our ideal) CRM system."

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