



CASE STUDY

Cattolica Assicurazioni gains a 360-degree view of customers with integrated CRM platform

Cattolica Assicurazioni built an enterprise-wide ecosystem based on the capabilities of a modern customer relationship management (CRM) platform, gaining a 360-degree customer understanding and launching a data-driven journey toward growth.

Situation

Leveraging insights to put the customer at the center

Cattolica Assicurazioni is one of Italy's leading insurance companies with almost 3.6 million customers, 1,439 agencies and a network of 1,924 agents spread throughout the country. The company, which in 2018 recorded a premium collection of almost six billion euros, has twelve insurance and bancassurance companies as well as other companies active in real estate, agriculture and operational services.

In recent years, the company designed a customer-oriented strategy, utilizing the data available to the entire company to obtain customer insights. It was aware that this ambition required modern processes and platforms.

Branches and local agencies managed relationships with contractors independently of the rest of the organization, including the collection and retention of all records, contract agreements and claims. The growth of the business resulted in the company adopting four different CRM platforms that are now obsolete and require their own management and maintenance.

Business data was fragmented and often duplicated with inefficiencies, leaving marketing and sales teams with incomplete information.

Solution

A progressive hybrid cloud approach

Cattolica Assicurazioni chose the modular hybrid strategic approach suggested by Avanade, which initiated a five-year project aimed at updating and progressively transforming the company's CRM platforms. The shared plan was to migrate all CRM systems to a single, consolidated, on-premises version. This strategic phase enabled the company to achieve its customer orientation goals while creating a single modern platform suitable for future cloud expansions.

"Avanade has proven to be a reliable and competent partner in the implementation of the CRM platform, allowing the company to grasp its innovative potential," commented Alberto Ricchiari, chief information officer at Cattolica Assicurazioni.

With the primary objective to change the company's paradigm from a policy to customer-centric vision, the project leveraged design-thinking methodologies to outline a strategy for the design and integration of processes that would put the user experience at the center. Leveraging the company's enterprise-wide information assets, Avanade implemented several customized modules within the program, designed specifically for the commercial, marketing and contact center teams. We also provided process efficiency management by creating an agency portal that would allow users to manage dialogue quickly and easily between management and the commercial network.

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Results

A 360-degree view of each customer

Cattolica Assicurazioni gained many advantages with the implementation of its new CRM ecosystem:

- **More advanced sales and marketing:** Sales and marketing operations have evolved. "Today, the network of agencies has a single point of access, even on the go, to a complete set of customer information – from the composition of the portfolio to the claims history," said Camillo Periti, head of customer experience and digital support at Cattolica Assicurazioni. "In this way, agents are able to offer highly personalized consulting services to customers. In particular, thanks to these real-time insights, work teams can also create personalized digital campaigns on the go and stimulate engagement with the customer in a truly multi-channel perspective. Examples include mobile-optimized campaigns, targeted campaigns, contract management, complete dematerialization of the sales process and contract finalization – using advanced electronic signature, mobile revenue operations and support for a number of customer-centered marketing initiatives."
- **Digital workplace:** This solution is the foundation for starting a digital journey, accelerating services, reducing costs and refining collaboration between subsidiaries in an exchange of customer information. For example, the CRM platform supports all customer-facing operations managed by local agencies while also reducing ticketing and cross-organization maintenance.
- **Central analytics:** The deployment of the modern CRM platform has improved the company's ability to obtain actionable data and provided sales and marketing teams with measurable strategic performance indicators and customer-centric goals.

About Avanade

Avanade is the leading provider of innovative digital and cloud services, business solutions and design-led experiences on the Microsoft ecosystem. With 36,000 professionals in 24 countries, we are the power behind the Accenture Microsoft Business Group, helping companies to engage customers, empower employees, optimize operations and transform products, leveraging the Microsoft platform. Majority owned by Accenture, Avanade was founded in 2000 by Accenture LLP and Microsoft Corporation. Learn more at www.avanade.com

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