



INSURANCE

Centraal Beheer Achmea – Insurance Case Study



Centraal Beheer Achmea ('CBA') is one of the largest insurance companies in the Netherlands. Together with several other companies such as FBTO, Avéro Achmea and Zilveren Kruis Achmea, CBA makes up the Achmea Group. These direct writers offer pension insurance, life insurance, damage insurance and other insurance policies, and provide financial services to private clients, employees and business clients. CBA makes extensive use of various marketing instruments and campaigns for all those services, such as flyers, brochures and advertising campaigns.

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The question

CBA puts a great deal of time and efforts into marketing. It uses a variety of different resources and sets up a wide range of marketing campaigns. To help organise these efforts centrally, CBA was looking for a system that could support it in planning and carrying out its campaigns and that, at the same time, allowed the accompanying materials to be centrally stored while remaining accessible to anybody.

FBTO was looking for the same kind of system as Centraal Beheer Achmea. A single Marketing Portal was needed that could solve both companies' problems: a solution that would cut costs and enable faster, more efficient and consequently cheaper marketing activities.

The solution

Using MarketingOne, Paragon developed an online Marketing Portal for Centraal Beheer Achmea and FBTO. The marketing departments at CBA and FBTO can use that Marketing Portal to initiate, carry out, monitor and control multiple campaigns. It can also be used for other purposes, such as drafting marketing briefings, creating communication plans and generating accompanying communications.

A key element of the Marketing Portal is the workflow: computerised support for the marketing and communication process, to make sure that each step of the campaign is completed in the correct sequence and that the duration of the campaign is carefully monitored. The program creates tasks and assigns them to the appropriate employee, while the marketer monitors the status of the entire process.

The Marketing Portal offers an organised overview of all the tasks, either by employee or in an overall list. The marketing departments can also place each individual campaign or task in a timetable and so monitor and control the activities.

Depending on how rights are assigned, the portal can be accessed by different job titles, at any time.

The result

The Marketing Portal is a shared system used by Centraal Beheer Achmea and FBTO. However, both companies retain their own identities, since they each have specific requirements and separate business processes. All the marketing instruments are stored at a central location and can be modified within the framework of a series of guidelines, ensuring that the companies retain their corporate identity.

This system makes it possible to initiate and manage campaigns simply and efficiently. It also makes it easier to keep an overview and monitor campaigns, resources and processes.

Summary

Anybody with user rights, whether a marketer or the marketing manager, can access the Marketing Portal. Access is based on rights. The marketing manager can view every completed and current campaign, while marketers have access to all information that is relevant to their specific campaigns and the Traffic department monitors the status and performance of all current campaigns.

This makes it possible for everybody to see the current phase of a particular campaign at any given moment. The marketing manager also has a total campaign overview, showing the status of multiple campaigns at a glance.

Supervision

The Marketing Portal offers central storage of marketing data and makes it easier for Centraal Beheer Achmea and FBTO to comply with the requirements laid down in the Dutch Financial Supervision Act (Wet op Financieel Toezicht), which governs the supervision of financial institutions in the Netherlands and sets out the rules and paperwork requirements for insurance companies and other institutions.

The Marketing Portal makes it possible to reproduce data about who carried out what activity and when. This offers better control of marketing activities without requiring additional time. Since communications, addresses, digital signatures, tasks and approvals are all recorded; those data can be retrieved quickly. This represents an important step for CBA and FBTO toward making their marketing communications fully compliant with financial supervision requirements.

Benefits

The Marketing Portal offers Centraal Beheer Achmea and FBTO the following benefits:

- Savings;
- Less time required for marketing processes;
- Information about campaign planning and status;
- Central storage of information;
- Compliance with the requirements of the Financial Supervision Act.

Quote:

Paul Brouwer, Manager Marketing Services:

'Concentrating as much information as possible in one location: that is our goal. In addition, the information stored in the central marketing database can also be used for financial supervision requirements.'

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