

COMARCH

COMARCH AUTOMATES UNIQA'S SALES FORCE

CASE STUDY





IMPLEMENTATION SCOPE AND OBJECTIVES

Comarch has cooperated with UNIQA for over 10 years. A central system for servicing nonlife insurance, sales network and commission policy management solutions, application for a telephone claim service and a portal supporting sales processes – all of these, and more, were implemented by the Polish supplier at UNIQA. In 2015, Comarch has completed the implementation of a new internet platform version at UNIQA supporting insurance sales as well as after-sales policy and customer service.

CHALLENGES

Staying for many years at the forefront of insurers in Poland in terms of written premiums, UNIQA has early on implemented a portal comprehensively supporting sales processes. In the past, the insurer's main goal was to provide its network of agents with an efficient, browser-accessible solution facilitating insurance product sales. Following the trends in the insurance market, UNIQA has quickly focused on individual customer approach by taking their needs into account as well as on the potential of tools supporting customer retention and optimal management of product offerings (cross-selling).

Thus, the company decided to extend the existing IT infrastructure with additional customer communication channels, expand the customer knowledge base and implement tools to shorten time of sales and after-sales service. The overriding objective was to increase both customer loyalty and written premiums. Comarch was selected to achieve this objective, as from UNIQA's standpoint it presented the most interesting offer of expanding the existing portal.

Dossier

Company

UNIQA Group Poland

Industry

Insurance

Project objective

Delivery and implementation of the upgraded internet platform supporting sales force

Implemented solution

Sales Service Portal building upon the concept of a comprehensive front-end for insurance agents – Comarch Insurance Agent Essentials along with support for the Contact Center

Solution supplier

Comarch

Project duration

June 2013 – September 2015



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Starting the implementation of the second-generation Sales Service Portal in 2013, we realized it was not only a substantial challenge in terms of meeting the business needs of UNIQA's agent network, but also a huge organizational and logistics effort for all distributed teams from Łódź, Kraków and Gdańsk engaged in the project. Moreover, during the project, UNIQA's team realized their own implementations, periodically synchronizing insurance product changes with new features of the portal. This was possible thanks to the application's modular design, solidly-designed API and flexible ecosystem shared by Comarch and based on Java, JBoss and Oracle technologies used by both our developers and UNIQA's implementation team. Implementing the new solution, we focused not only on improving business processes related to the insurance activity, like customer profiling, product sales or sales network management. We also created a basis for the future development of the platform in terms of mobility as well as support for and automation of the insurer's other business processes, not just the sales ones.

Tomasz Arciszewski
Project Manager and Director
of Comarch's production center

IMPLEMENTATION RESULT

The solution offered and implemented by Comarch provides UNIQA's sales force with a functionality covering all major business areas necessary for the sales process realization – full customer profile, multichannel history of their interactions with the insurer, current information on their nonlife and life policies, recent statuses of filed claims and related payments, as well as support for marketing campaigns. Moreover, it provides agents with efficient analysis of customer needs, access to their documentation and quick execution of quoting and issuing policy processes, providing the possibility of customer online payment or automatic cash settlement with the agent via online channels.

Support for underwriting processes and management of filed claims via the Contact Center module are equally important elements of the implemented solution. The new platform standardizes and streamlines the flow of information between the employees of a call center, back-office and sales network, shortening customer waiting time for the insurer's decisions.

The implemented solution builds upon the concept of a comprehensive front-end for insurance agents – Comarch Insurance Agent Essentials which integrates data from all major insurance company systems and automates key insurance business processes.

COMARCH INSURANCE AGENT ESSENTIALS



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The new, expanded internet-based solution for sales force implemented in cooperation with Comarch is another step in realizing our goal of being an ultra-modern insurer. Sales of insurance products and services meeting the expectations of our customers requires giving maximum comfort to our salespersons in the form of effective IT tools. Features provided by Comarch ensure that our agents, managers and call center employees enjoy optimal work performance and serve our customers at the highest possible level – quickly and efficiently.

Jacek Szwankowski
Project Manager
for POS 2.0 at UNIQA

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For UNIQA's sales force, the new online platform comes with ease of use not only on desktop computers but also on mobile devices. Aggregating all the key information – from both nonlife and life systems guarantees a comprehensive and efficient customer service at any moment of quoting and policy-issuing processes and their subsequent service. It also cooperates within a single ecosystem with the Contact Center module, as well as with the universal Workflow Module facilitating the optimization of UNIQA's business processes.

Tomasz Arciszewski
Project Manager and Director
of Comarch's production center



COMARCH INSURANCE AGENT ESSENTIALS

A comprehensive front-end solution to support business processes of an insurance company in terms of building and managing a client portfolio, policy sales and service, performance monitoring as well as distribution of knowledge and information management for the sales force.

UNIQA

UNIQA is represented in Poland by two companies: UNIQA TU S.A. and UNIQA TU na Życie S.A. offering property, vehicle and life insurance for both individuals and institutional clients. Currently, UNIQA TU S.A. occupies the 5th position in the insurance market in terms of written premiums. With an extensive sales network and commitment of more than 3,000 agents, UNIQA stays close to customers providing them with professional advice and assistance in choosing their insurance. UNIQA's products can be purchased either as part of an exclusive network consisting of 130 branches, as well as in multiagencies and with brokers and car dealers. UNIQA is the winner of the Reliable Employer 2014 competition. In 2014, it has also received the following awards: 'Customer Laurel - Discovery of the Year 2014' for home insurance, 'Modernization of the Year 2013' in the 'Office facilities' category, Polish Enterprise Agency Innovation Award 'Quality International' and Innovative Company



certificate for POS Sales Service Portal, as well as 'Good Policy' certificate for household insurance with a premium payable monthly. The strategic investor of both companies is the Austrian-based insurance holding - UNIQA Insurance Group AG.

More information: www.uniqapl



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ABOUT COMARCH

Founded in 1993 in Kraków, Poland, Comarch prides itself on being one of the leading software houses in Europe with over 5000 employees worldwide and more than 3000 successful projects carried out for the largest international brands.

With 20 years' experience in the industry, Comarch Financial Services, a business sector within the Comarch Capital Group, specializes in developing sophisticated software and IT systems for major financial institutions in banking, insurance and capital markets.

Our expertise has gained worldwide recognition and a significant portfolio of clients among insurers, banks, mutual and pension funds, brokerage houses and asset management companies in more than 30 countries. Our client list includes UniCredit, Société Générale, BNP Paribas, Swiss Life, Ergo, Oney, Allianz, and more.

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