

SAP Customer Success Story



PFA Pension is the largest pension insurer in Denmark, but the company isn't resting on its laurels.

PFA implemented mySAP.com™ in only eight months – with a focus on my mySAP™ Customer Relationship Management (mySAP CRM) – to collect and maintain comprehensive information on its customers so it can serve them more effectively.

PFA
PENSION



PFA PENSION PICKS mySAP™ CUSTOMER RELATIONSHIP MANAGEMENT TO PINPOINT CUSTOMER NEEDS

PFA uses mySAP CRM to generate, update, and maintain both hard and soft information on its corporate customers and their employees, including contact information, contract terms, and personal preferences. The company can then direct new product enrollment campaigns to the appropriate prospects based on the structured, easily accessible, customer-specific information available from mySAP CRM. PFA will also use mySAP CRM to manage product campaigns and to provide its salespeople with a template of best-practice sales-process steps to support their calls.

“Over the years, our customers were providing us with a lot of important information about what interested them and which of our products they might want to purchase,” says Peter Nielsen, IT manager. “This information resided in the individual knowledge of the salesperson or on a piece of paper. Until we had mySAP CRM, it was difficult to access the information or act upon it. And if a particular salesperson left the firm, the customer knowledge might be lost.”

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Peter Nielsen, IT manager

ALL THAT HAS CHANGED WITH mySAP CRM

“Our salespeople and account managers can now realize the benefits of having all their information about a customer maintained in a single system,” Nielsen says. “Through rules and controls we have built into the system, they can also make offers and draw up contracts very quickly, without having to send them to legal to get approved. We can now create contracts in hours, as opposed to weeks.”

PFA takes advantage of the flexible product-configuration capability within the mySAP.com platform to quickly tailor each pension product to the customer’s needs. Salespeople mix and match standard product elements – retirement, disability, life – to build insurance contracts consistent with rules that PFA has established for combining the elements within valid product configurations.

Implementing mySAP.com solutions has enabled PFA to fully integrate its core business processes, from initial customer contact through customer relationship management. “We wanted one integrated system, so that we could key in customer contact information right at the beginning and continue to build upon that information through flexible product proposal and offering, contract execution, customer registration, and ongoing account and relationship management,” says Nielsen.

DENMARK’S LEADING INSURER

PFA Pension is headquartered in Copenhagen, Denmark and has offices in eight other Danish cities, an office in Luxembourg for Danes living abroad, and a satellite operation in Greenland. The company, which employs 850 people, collects annual premiums totaling \$1.3 billion and manages \$18.4 billion in assets.

PFA Pension's corporate customers pay a percentage of their employees' salaries to PFA, which then constructs the appropriate policy for each employee. PFA serves 12,000 firms and more than half a million individuals. This made it especially important for the company to implement a CRM solution that could be quickly and easily adapted to multiple product configurations and personalized requirements. "We needed a flexible CRM solution to optimally exploit two of the most valuable resources our consultants and employees have – their time and knowledge – in order to make personal consultation successful," says Nielsen.

PFA implemented the mySAP.com platform quickly, using the AcceleratedSAP™ methodology to roll it out in just eight months. The company also uses mySAP Human Resources (mySAP HR) for personnel administration, recruitment, and time management. PFA's next step will be to implement mySAP Business Intelligence (mySAP BI) so it can tap its comprehensive information repository for enhanced reporting and information flow to users. PFA also plans to roll out mySAP CRM on the Web to brokers located remotely from its facility to provide that business channel – which sells 25% of its policies – with access to the solution.

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EXECUTIVE SUMMARY

PFA Pension implemented mySAP Customer Relationship Management (mySAP CRM) to collect and maintain comprehensive information on its customers to serve them more effectively. PFA Pension now directs new product enrollment campaigns to prospects based on the structured, easily accessible, customer-specific

information within mySAP CRM. The company has a single, integrated system for entering customer information, configuring products, executing contracts, registering customers, and managing the ongoing customer relationship.

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At A Glance

SAP solution components	- mySAP Customer Relationship Management - mySAP Human Resources - mySAP Business Intelligence
Hardware platform	- Compaq servers
Operating system	- Microsoft Windows NT
Database	- Oracle
Number of users	- 500
Number of sites	- 11
Length of implementation	- 8 month