SUGARCRM

Generali Hellas

Generali Hellas Empowers Sales And Service With
Unified Customer Data On SugarCRM

GENERALI HELLAS
ΟΜΙΛΟΣ GENERALI
Ανώνυμος Ασφαλιστική Εταιρία

Sugar Partner Qualisys Software Integrates Sugar with Multiple Solutions for the Ultimate One-Stop Customer Information Resource

Generali Hellas, a market leader in the provision of comprehensive insurance solutions, engaged Sugar partner Qualisys Software and implemented SugarCRM. Generali Hellas' Sugar solution has eliminated disparate systems and consolidated operations on a single platform, which has improved follow up with prospects and ensured that all customer calls receive prompt attention. Using Sugar has also increased internal collaboration, while providing fast and effective analysis and reporting, including key performance indices for each customer account and line of business.

Business Challenges

Generali Hellas strongly believes that access to information and immediate response to customer needs and demands is imperative. Having established a large customer base of insurance agencies and bureaus throughout Greece, the company's internal sales department needed to track and manage a large volume of customer data and documents regarding meetings, proposals, sales forecasts, production figures, endorsements, and insurance certificates. In addition, sales management also wanted more complete and accurate forecasts of sales pipeline activity, better reporting capabilities, and greater control of sales and service processes. Additionally, its IT team needed a solution that could be integrated with existing corporate systems, BASIS, THESIS and the IBM AS/400.

The Solution: SugarCRM Enterprise

With a firm grasp of its business requirements, Generali Hellas researched the market to find the most effective solution. The company chose Sugar for its option of an on-premise deployment, ease of integration, and intuitive user interface. "We created a solid team with members from sales, IT, and Sugar partner Qualisys Software," explains Dimitris Melexopoulos, brokers & non tied agents manager for Generali Hellas. "Our team was able to fully integrate all of Generali's internal systems (GBOX platform) with Sugar, providing sales with the ultimate "one-stop" customer information source, where all client information is stored and classified according to our needs."

Qualisys also managed data migration from Generali Hellas systems, customized various Sugar modules, and set up new workflows for each customer account. Its IBM AS/400 integration automatically imports production data and agency information into Sugar on a daily basis, using web services to create new records in the AS/400.

Business Benefits

The Qualisys Sugar solution for Generali Hellas has effectively unified independent systems and consolidated operations on a single platform, thus improving follow up with prospective clients and ensuring that all customer

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Dimitris Melexopoulos
Brokers & Non Tied Agents Manager
Generali Hellas

calls receive prompt attention. In addition, the entire customer lifecycle process has been automated. Sugar enables increased document sharing and collaboration and provides fast and effective analysis and reporting, including key performance indices for each customer account and line of business.

"With Sugar, we now have effective organization, management, and monitoring of all sales related activity," concludes Melexopoulos. "It has improved the efficiency of the team, accelerated client response time, reduced the time required to locate client information, and given us more quality time for sales."

About Generali Hellas

Generali Hellas is a member of Assicurzioni Generali S.p.A., the largest European insurance group and second largest global financial insurance company in the world. Comprised of 476 companies, the Group is operative in more than 60 countries around the world, with over 85,000 employees and 70,000,000 clients world-wide.

Founded in 1886, Generali Hellas is the oldest insurer in Greece. With more than a century of experience and technical know-how, the company offers a wide range of specialized Life and non-life insurance products. During the past decade the company has shown particularly rapid growth, effectively tripling its portfolio.

Committed to "Making Insurance Quality of Life," Generali insists on the responsible management of insurance needs and responds to specialized insurance demands by offering a wide variety of solutions. For more information see www.generali.gr.

About Qualisys Software

Qualisys Software is a young, dynamic business specializing in the implementation of CRM applications on various platforms. Qualisys Software offers its customers perfected solutions in the fields of software, service, and support. Qualisys Software has a proven track record of multiple successes in developing, designing, and implementing software as well as in outstanding technological innovation. Furthermore, Qualisys Software provides its customers with new technologies and tailor-made solutions through a holistic approach. For more information see www.qualisys.gr.

Company Profile

Headquarters:
Athens, Greece

Founded: 1886

Company Description:
Generali Hellas is a member of Assicurzioni Generali S.p.A., the largest European insurance group and second largest global financial insurance company in the world.

Website:
www.generali.gr

Solution:
Sugar Enterprise

SugarCRM

Customer relationship management (CRM) software for business. In the cloud, online, on-demand, or on-site— the best sales, email, and mobile CRM integration.

www.sugarcrm.com

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