| **French Multinational Insurance Firm**

Going Customer-Centric:
Enabling Better Customer Conversations

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Acting Head of Technology Platforms
French Multinational Insurance Firm
Regional Office

Goals	Solution	Results
Provide more knowledgeable, personalized service across all lines of business and identify sales opportunities	Leverage Informatica MDM to detect opportunities across different lines of business	Insurance agents have the customer information they need to provide the best service and identify cross-selling opportunities
Deliver more value to customers and move away from policy-centric conversations	Empower insurance agents operationally with Informatica MDM and Salesforce integration	Continuously improving sales and service channels through accelerated time to value for digital transformation
Be certain about customer relationships with a single, actionable, 360-degree view of customer and policy information	Use Informatica MDM to identify unique customers and understand all relationships with a customer, rather than on a per-policy basis	The business can identify unique customers with certainty, giving an accurate count of total customers

This French Multinational Insurance Firm is one of the world's largest insurance companies, ranked as the number-one global insurance brand for 10 consecutive years by global brand consultancy Interbrand. In Asia, the company maintains multiple lines of business for insurance, including life insurance, general insurance, and health insurance, offering services in Hong Kong, Singapore, Indonesia, China, Malaysia, India, Indonesia, Thailand, Korea, and the Philippines. Many customers have multiple policies, and when they speak with agents, they expect the agents to have a full picture of their insurance coverages.

"We think it's very important that we're customer centric, and that means that we understand our customers across all our lines of business," says the Acting Head of Technology Platforms, who is responsible for data integration and platforms across the Asia region.
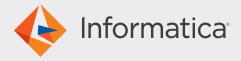
Like many insurance companies, this organization still has siloed legacy systems that contain information about each line of business. These systems are policy-based, which makes it difficult to identify unique customers. In the past, customer information had to be entered each and every time a new policy was issued. This resulted in duplicate customer entries, which made it difficult for the business to accurately assess how many customers it had relative to the number of policies issued to them.

They decided to address this challenge as part of its digital transformation program, which includes the rollout of a reusable API layer, data integration and master data management (MDM). If the business could better identify customers across all lines of business, it could empower agents to provide more knowledgeable, personalized service and increase revenue by cross-selling additional types of insurance policies.

"Going customer-centric was an important goal for us and gave us a clear business case for investing in MDM to support our ongoing digital transformation," says the Acting Head of Technology Platforms. "We want to be 100 percent certain about our customer relationships, so we needed a solution fueled by MDM."

From policy-centric to customer-centric

To give insurance agents a complete view of each customer and allow them to access the information from mobile devices, they rolled out Salesforce and used Informatica MDM to fuel Salesforce with trusted customer data.

"We have been partners with Informatica for some time," says the Acting Head of Technology Platforms. "We had a very well-established data integration portfolio making use of Informatica PowerCenter, so it was quite natural to consider Informatica in the customer centricity space around MDM."

Using Informatica MDM, they can easily identify unique customers and use that data operationally as insurance agents interact with customers. Customer contacts can be validated with certainty, as well as all the insurance policies the customer owns or has purchased in the past.

"We started to implement Informatica MDM to provide a more powerful solution for our agents, so they could understand all our relationships with a customer, rather than on a per-policy basis," says the Acting Head of Technology Platforms. "When there is a customer who may have multiple policies, how could they have a better conversation with that customer?"

Giving customers more value

With a single, actionable, 360-degree view of customer and policy information, agents are indeed having better conversations with customers. They have already cross-trained many agents on different insurance product lines, giving customers more value because they now have a one-stop shop for their insurance needs.

"The big advantage of having a customer centricity solution like Informatica MDM is that we can use the data operationally to empower our agents," says the Acting Head of Technology Platforms. "We're already a trusted insurance provider, and allowing our agents to have a single conversation with a customer lets them offer multiple different products across different lines of business. It's a win-win."

Industry leading service and support

Throughout the rollout and after, they worked closely with Informatica, gaining access to reference customers and research and development teams as needed.

"MDM is an initiative we wanted to undertake with a committed strategic partner," says the Acting Head of Technology Platforms. "I've worked with many suppliers and vendors, and Informatica is the only one that I know that I can call at any time, and they will always respond and do their best. That's not a frivolous thing."
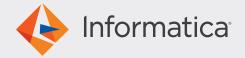
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A foundation for data-driven digital transformation

With data stewardship firmly in place, they intend to make the most of its diversified presence in Asian markets. As its MDM strategy matures, it plans to optimize every touch point with customers to provide the best possible experiences and the most opportunities to increase revenue.

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Inside The Solution:

- Informatica MDM

- Informatica Data Integration