



PegaWorld*iN*spire

W&W württem
bergische

W&W: Future-proofing Sales and Service with Pega CRM

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Client Success Manager, Pega





w&w württembergische



We Develop a New CRM System for the Whole Sales-department with Pega and Rebuild the Existing CRM

The existing CRM system is at the end of its existing lifetime

- Outdated technology
- Lack of compatibility with peripheral systems
- Very complex and cost-intensive

With other existing projects in the company, that aim to replace the legacy system in the front office, we need to parallelize the development of the Sales CRM and need to built back the existing CRM legacy system at the same time

What is the best way to do this for our company and what are the goals in this project for the CRM system and the use for the costumers, that the new CRM is better than the existing?

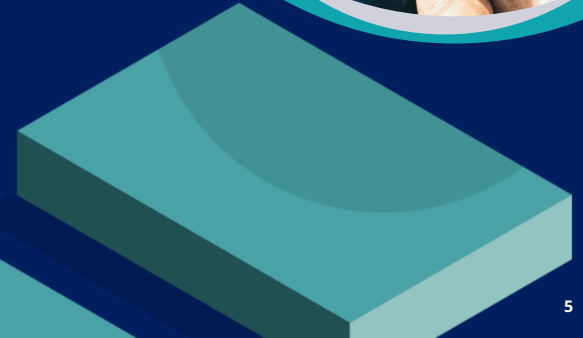


Implementing CRM and application routes



Rebuilding the Old World with New Value 1/3

- Legacy System runs since > 30 years and has a lot of customized options for the insurance intermediary
- This is why our costumers love the functionalities, but not the UI/UIX
- The challenge lies in:
 - Not replacing the old legacy world 1 to 1
 - Retaining the good existing functionalities
 - Offering functional and design benefits for the users and costumers and
 - Winning the insurance intermediaries for the new system



Rebuilding the Old World with New Value 2/3

- In the last two years, the focus of the insurance was in implementing the application routes for
 - Health insurance and
 - Oldtimer insurance
 - ... All of them B2B and B2C
 - The new CRM system was only used as a drop into the application routes, that is why
 - A lot of insurance intermediaries did not use the new CRM System
 - A lot of functionalities were implemented from the legacy system to the new CRM system and will still be implemented



Rebuilding the Old World with New Value 3/3

- Now we, step by step, optimize the existing CRM part with new functionalities and build new application routes for
- Car insurance
- Composite insurance
- Life insurance
- ... and so on





That is WHY WE NOW ENSURE the Development with a E2E Organization / Process

Head of Digital Sales

Pega CRM

- Technical and process architectur
 - Requirements management
 - Change management
 - Reporting in committees
- VAP-Pega/CRM
- Württembergische Business Owner
 - Product Owner
 - IT-Projektmanager

Application routes combined with Pega/CRM

| | | |
|---|--|---|
| TAA Car Insurance • Project Lead • IT-Project Manager | TAA Health Insurance • Product Owner • Subject-Project Manager • IT-Project Manager | TAA Industry Insurance • Product Owner |
| TAA Life Insurance • Project Lead • Project Manager • IT-Project Manager | Sales Partner Portal • Product Owner | TAA Oldtimer Insurance TAA Rental deposit and so on |

- Product Owner and IT-Lead are essential for the several stand alone projects and the whole program
- Control of the program with a sales view out of one hand
- Control of the program with an IT view out of the other hand
- Common responsibility for implementation

The New CRM is the Single Point of Truth for the Insurance Intermediary

Lars Baum
Privatkonto

Überblick

Angebote erstellen

Vermittler zuordnen *
1030-0020-3 Michael Vertriebler

Verkaufschance zuordnen
Wähle aus...

Nach Produkt suchen
Such...

Segment

Kraftfahrt Privat

Firmen Leben

Kranken Finanzierung

Wohnsparen Investment

Sparte

Haftpflicht Hausrat

Wohngebäude Unfall

Rechtsschutz Sonstige

PK Police Domizil

50 Plus

TAA

Privat Tierhalter

TAA starten

Verträge

| Verträge | Versichert | Tarif | Rolle | Ablauf | Vermisst |
|-----------------------------------|--------------------------|---------|--------|------------|-----------|
| Kraftfahrt: 40-1231231-40 | | | | | |
| Vollkasko | 5 UN 123, Lamborghini... | Kompakt | VN, RE | 30.01.2023 | 1234-1234 |
| Haftpflicht | 5 UN 123, Lamborghini... | Kompakt | VN, RE | 30.01.2023 | 1234-1234 |
| Privatkunde: 12-1231231-12 | | | | | |
| Hausrat | Sonnenscheinstr. 2, B... | Kompakt | VN, VP | 30.01.2023 | 1234-1234 |
| Haftpflicht | Familie | Premium | VN, VP | 30.01.2023 | 1234-1234 |

Wohnen

Geldkonto, Geldanlage und Depot

Verträge

Angebote

Details

Notizen

Rechnungen

Kontakte

Kontenübersicht

Schadenmeldung

Angabe **Aktionen**

Angabe 1 **Gesamtbetrag 1.285,70 €**

Status **AKTIV - OFFEN**

Kundennummer 123-123-123

Hauptkontakt **Lars Baum**

Telefonnummer +49 152 123456789

E-Mail lars.baum@mail.de

Adresse Sonnenscheinstraße 2 10115 Berlin

Einwilligungser. Abgegeben

Kundenportal **Registrieren**

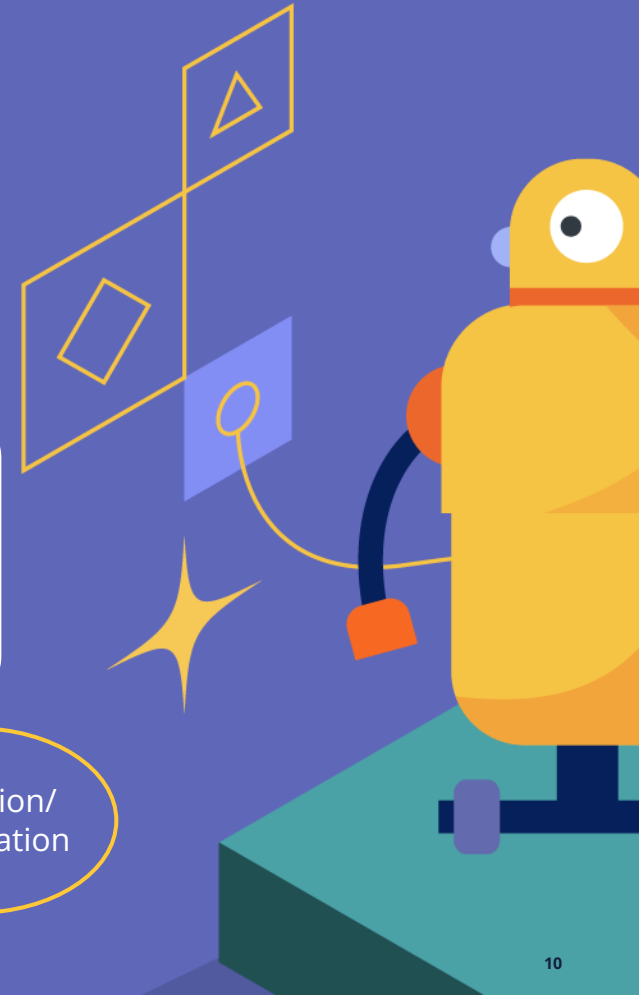
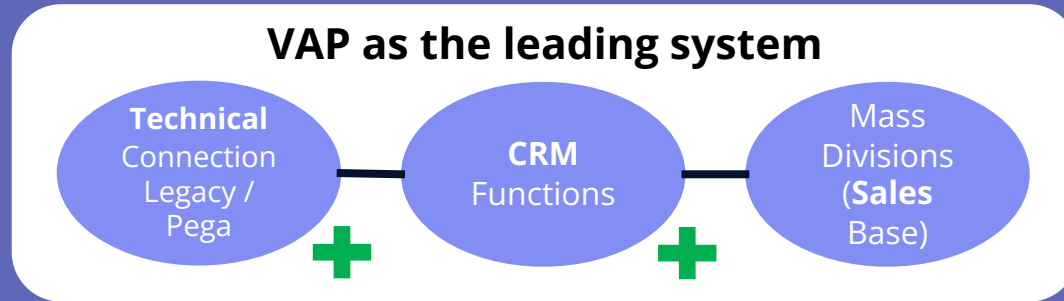
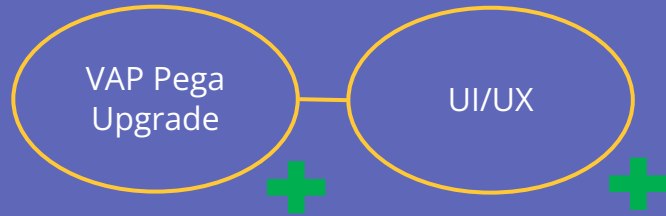
Geburtsdatum 10.05.1985

Hinweis Beitrag offen

Kommentare (Pulse)

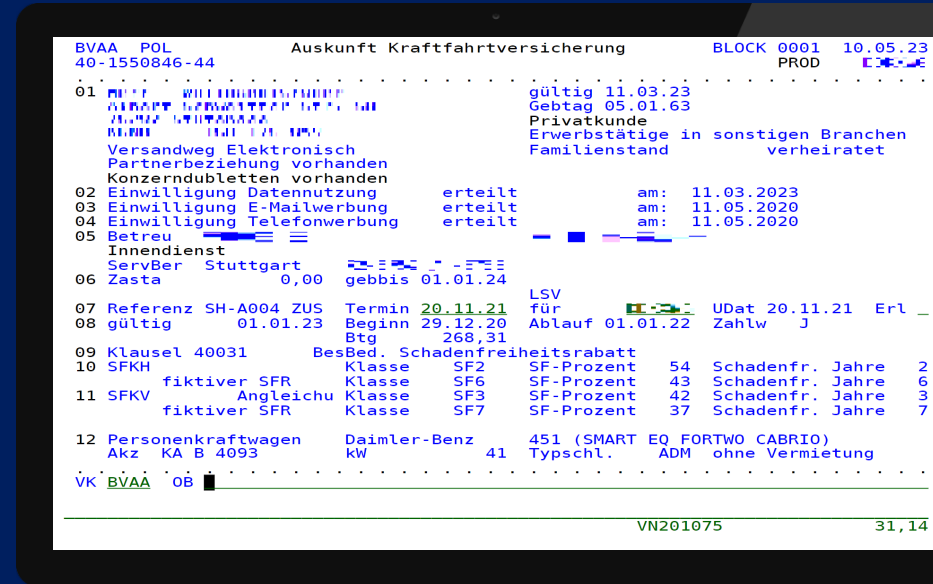
- All needed information's for our insurance intermediary referring to customer data, contracts, offers, ...
- With the transfer of all the customer data from the CRM part, our insurance intermediary jumps off to the application mode
- all out of one hand, all out of one system, all done with PEGA

The Technical-, CRM- and Sales Base are the Main Milestones for the New System

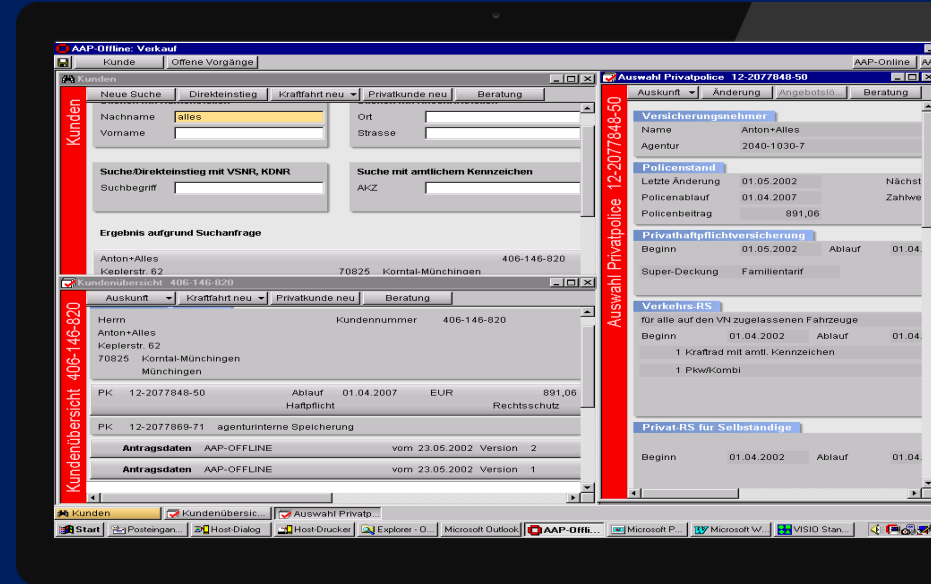
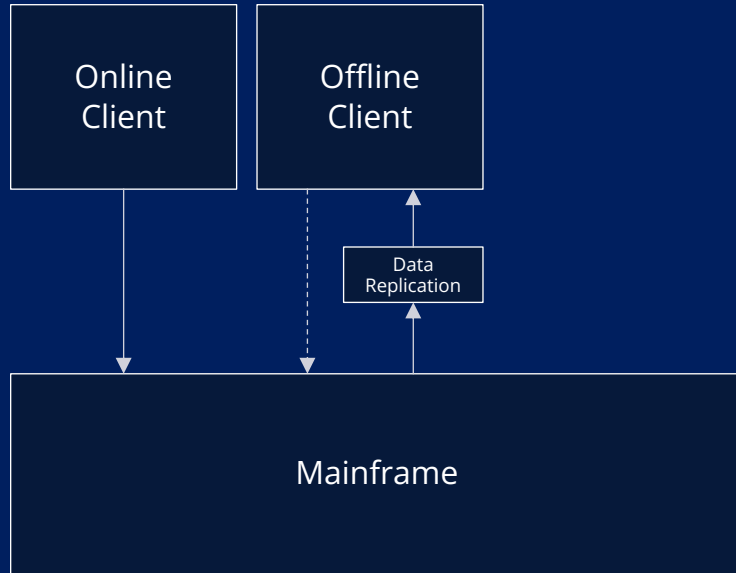


Coming from a Mainframe Based Monolith...

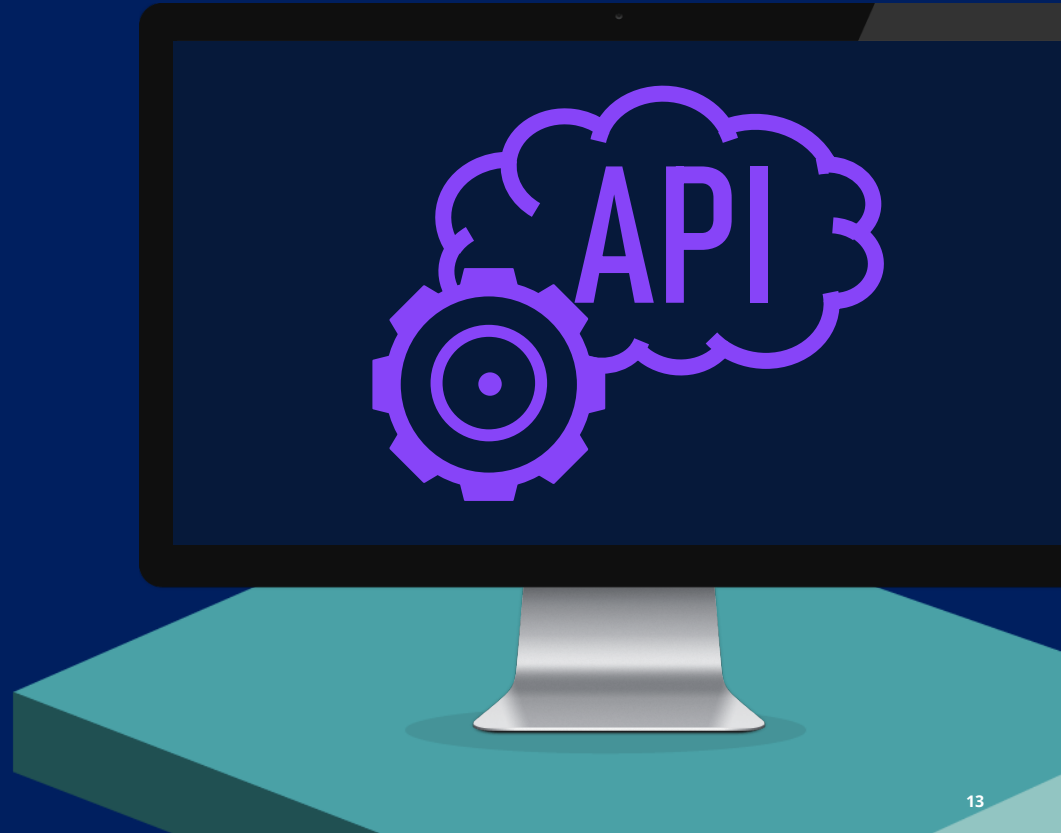
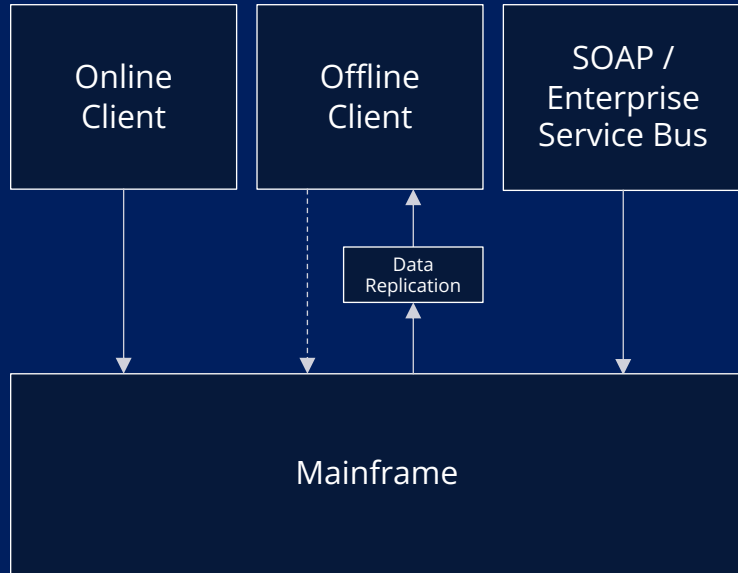
Mainframe



Coming from a Mainframe Based Monolith...



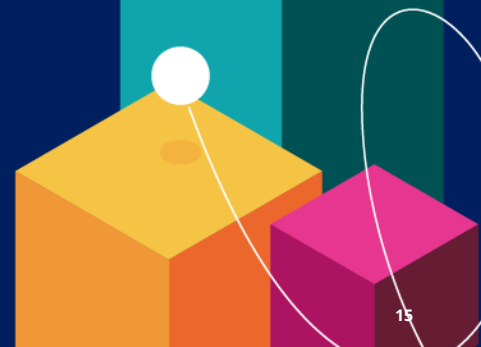
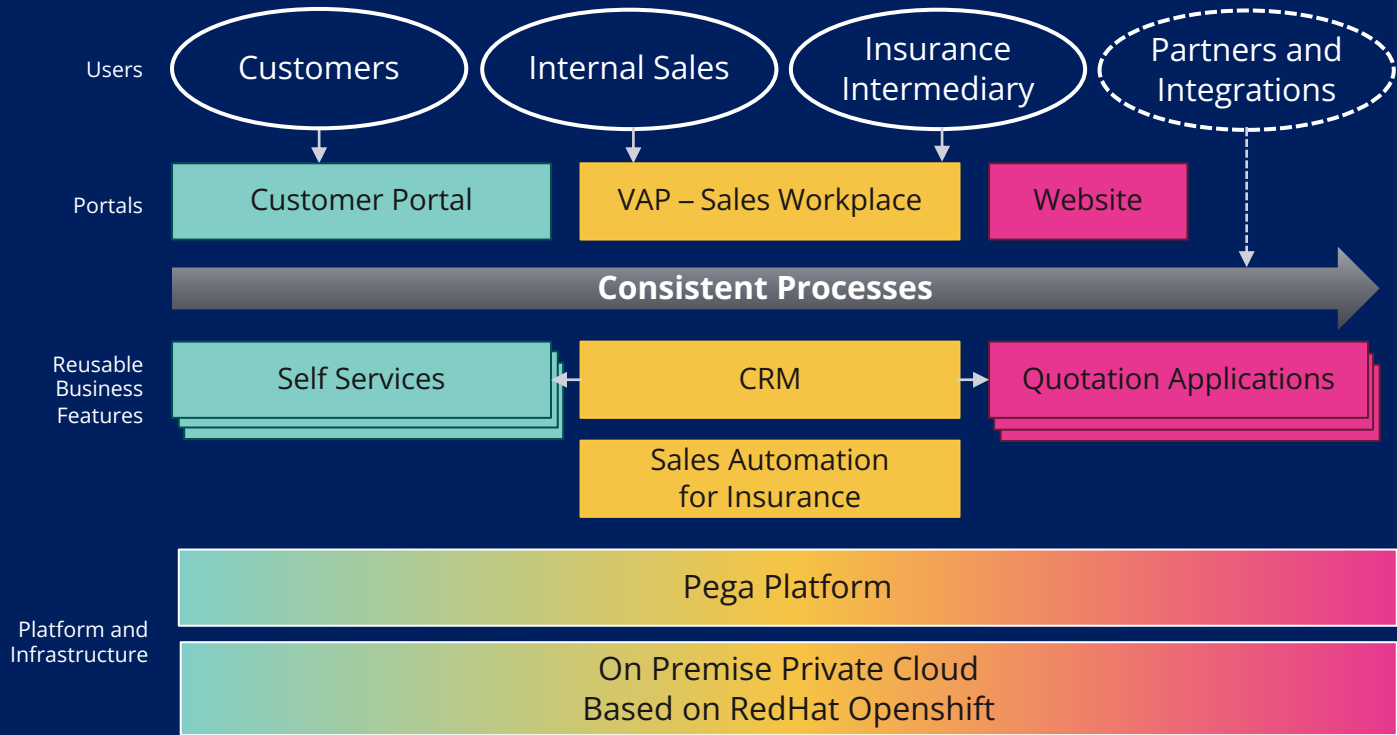
Coming from a Mainframe Based Monolith...



Challenges make it no longer possible to adapt to the ever accelerating pace of change!



... and Leaping Into a Decentralized Composable Business Architecture



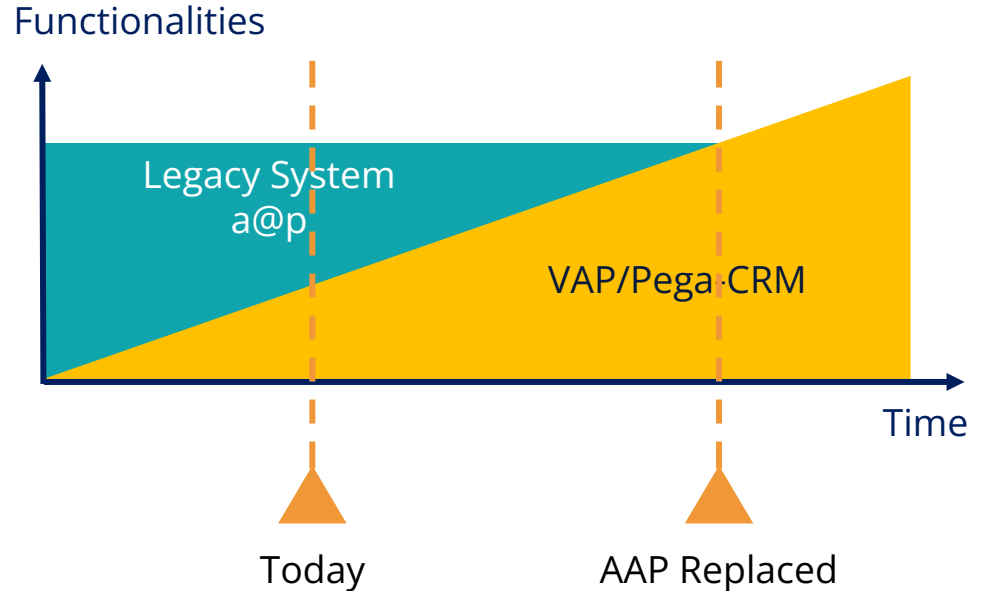
We replace the legacy system, once the new CRM functions fit for all our costumers



We Shut Down the Legacy System Once Everything Fits in the New World



- Parallel operation of the legacy system and the new System
- All functionalities in the legacy system will be built back technically if it works in the new CRM
- No insurance intermediary can use the old legacy functions anymore
- We see a raise up in all the products, that are in the new world – faster to finish and more sold products



A good change management is one of the keys to success



We are Involving Our Customers in the Process of the Development



One On One Interview

- Customers doublecheck developments
- Best case scenario in the office
- Re-development if necessary



Workshop

- A whole team checks click dummies and developments



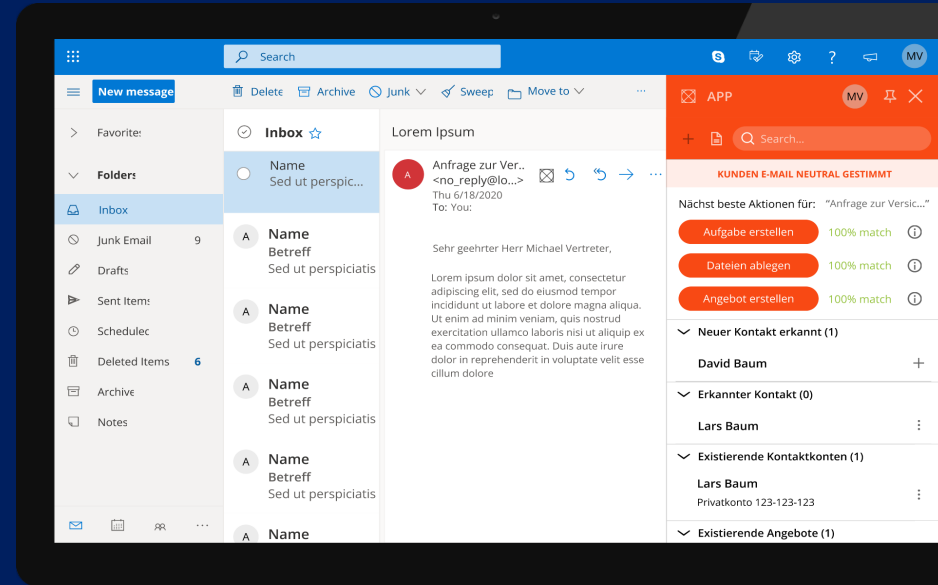
Outlook 2023 and following years



CRM Helps Us to Transfer The Insurance in a Digital World

A lot of good steps will follow in the next few years to make Pega the leading system

- New functionalities for the users
- New application routes
- New UI/UX Design in 2024
- Optimization every single day
- Increase of our insurance sales and reduction of our costs, because of easy and intuitive processes and applications



Building for the Future with PEGA



Empowering People...

- Integrate Business Users even better in the development by leveraging existing **Low Code Tooling**
- Give Business users the opportunity to automate their business in new and unexpected ways but in a controlled manner by leveraging **Citizen Development**
- Boost sales and staff efficiency by integrating **AI based features** like Next Best Action

Empowering Technology...

- Easily adapt and adopt technological change
- Improve User Experience by using Constellation and potentially REACT
- Being Cloud ready OOTB
- Integrate into other systems
- Multi channel ready (Apps for sales, chatbots, voice ai)



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