DAK accelerates its sales with a new software solution

Pega case study

Introduction

DAK-Gesundheit has replaced its in-house sales development with Pega Sales Automation Statutory Healthcare. With the new software, the health insurer can support the entire process from sales prospect to member in an integrated manner.

DAK-Gesundheit transformed its distribution structures and processes significantly in order to enter new markets. For example, the company started to collaborate more closely with multipliers and partners, such as external insurance brokers. The company's existing distribution software reached its limits: The in-house developed individual programming could only support new structures and processes on a very basic level. This was complicated by the fact that the DAK sales team had to work in parallel with additional software systems, for example, when they took calls from sales prospects. This went hand in hand with data silos and a lack of transparency.

For these reasons, the health insurer decided to replace its in-house software with state-of-the-art standard software.

"We no longer wanted to have to develop everything that was going to happen in the area of sales software over the next few years but instead be able to use a broad portfolio of functions and modules. For example, should we decide to use AI components going forward, these functions should simply be available and implementable. That is why we decided to switch from in-house development to standard software."

René Schlagentweith,
Head of Planning and Management, Customer Management Business Unit at DAK-Gesundheit

## Merge Marketing and Sales on one Platform

After the health insurer had assessed various providers' solutions, they finally chose Pega Sales Automation Statutory Healthcare software by Pegasystems. One of the decisive reasons for this choice was that DAK had already implemented a solution from this provider as part of another project. The company had already used Pega Marketing software to manage its campaigns. „This gave us the opportunity to combine marketing and sales on a single software platform and thus benefit from consistency and combinability", says Schlagentweith. "Pegasystems is one of the very few providers capable of covering all aspects of campaigns and sales topics with a single, comprehensive software package."

DAK introduced Pega Sales Automation Statutory Healthcare with Pegasystems and the implementation partner Greenfield Technology;

the solution is operated by Bitmarck, the IT service provider for health insurance. In the course of the introduction, the project partners also made some individual functional extensions to the software so that DAK can, for example, map its access authorisations and its complex area management.

In addition, they equipped the solution with bidirectional integration in Microsoft Outlook in order to optimally support the health insurer's mobile sales team. The software was already able to transfer agreed appointments with interested prospects to Outlook; with the creation of bidirectional integration, changes to appointments in Outlook are now also automatically effective in the Pega solution in the opposite direction. Seeing as many other companies can also benefit from this integration, Pegasystems has incorporated it into their standard software.

DAK-G: System Context Pega Sales Automation Statutory Healthcare
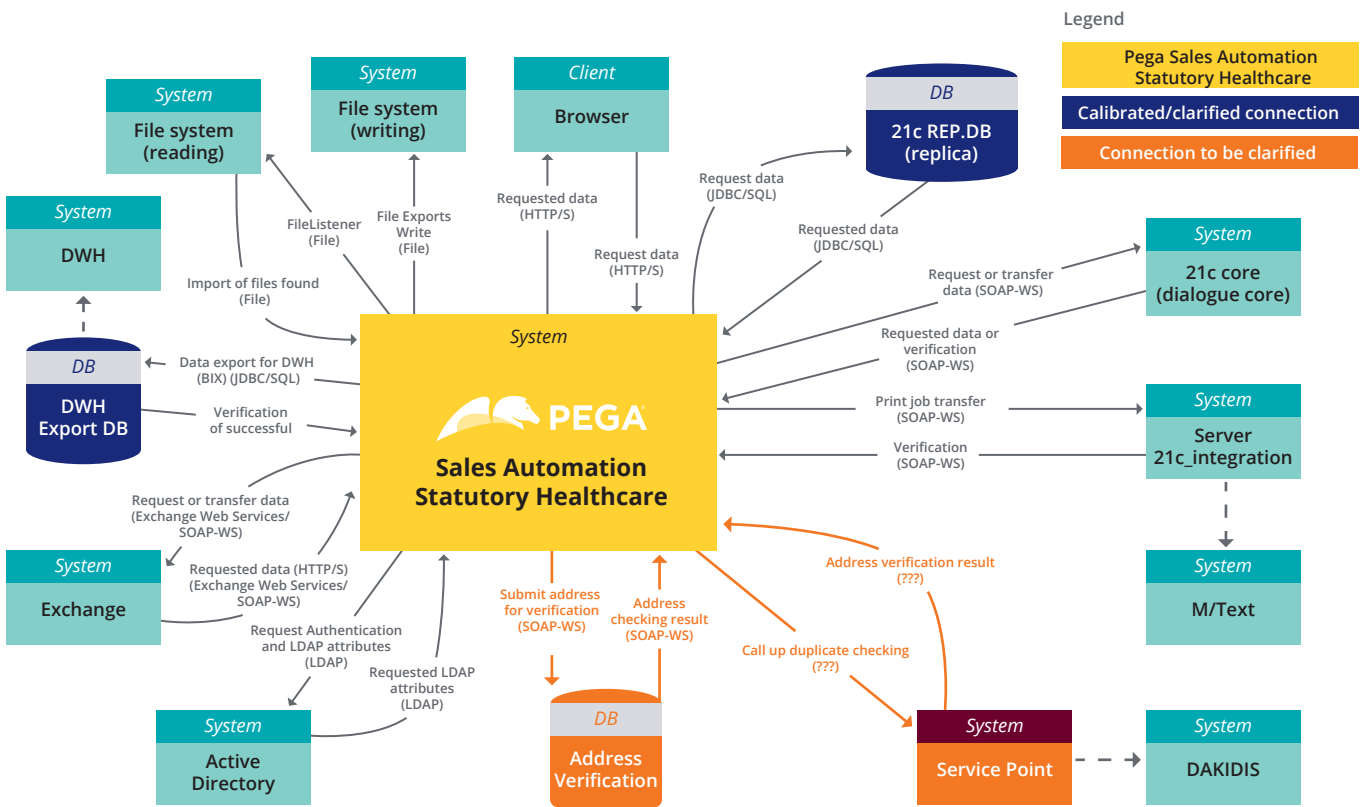
*Integration of the DAK sales solution into the existing system landscape

Integrated Coverage of the Process from Prospect to Member

Today, around 6,000 DAK employees use Pega Sales Automation Statutory Healthcare – and can thus achieve integrated coverage of the entire process from a sales prospect to a member. For example, if contacts are generated at an event, the sales team enters them into the software for post-processing. If they then have another conversation with a prospective customer, this contact will also be recorded in the system. Once the sales team receives the completed registration forms, they can assess them for correctness and completeness directly in the system and request missing documents if necessary.

Since the software is connected to DAK's existing system – the 21c|ng solution by Bitmarck – they will subsequently have the option of directly initiating the so-called „conversion": i.e. converting a prospective customer into a member. To do this, all the data required for this process is transferred to the inventory system, including links to store the documents in the DAK document management system. The health insurer's "Membership and Contribution Specialist Centre" that establishes the memberships also checks the data there and, in the event of ambiguities or missing information, can directly load the data back to the sales department with the order for completion or clarification.

„Thanks to the integrated process, we have become much faster and more efficient and have significantly improved process quality. Information is no longer lost and it is always clear how far the member assessment has progressed and who is responsible for the next step", says Schlagentweith. "Since our sales staff now only works with a single system, they also benefit from a high level of transparency. If a prospect or member calls, the team can immediately get access to their data and instantly view the caller's current status."

## A Special Tool for Online Sales Increases Customer Satisfaction

The online sales tool from Pega Sales Automation Statutory Healthcare also ensures greater efficiency. With this special add-on to the sales solution, DAK enables prospective customers to complete online applications on their own. In this way, the path from application for membership to actual membership can take place almost in real time. The onboarding process of a new member, which usually takes an average of five days, is done in a few minutes in conjunction with the online sales tool; And it takes an average of just three days for new members to be able to hold their insurance cards in their hands.

"The time saved and the fact that we need fewer resources thanks to the online tool is one thing," explains Schlagentweith. "But it is even more important to us that we can significantly increase customer satisfaction. This was our top priority when implementing the online sales channel. From the outset, our goal was not simply to satisfy our customers' expectations but to exceed them, and thus generate new customers."

The Software's Real Downtime Tends Towards Zero

The Head of Planning and Management in the Customer Management Business Unit is also very satisfied with the new sales software solution. In addition to the numerous process improvements the software solution has brought DAK, he particularly praises its stability: "There are actually only restrictions on availability due to planned processes such as software updates. The software's real downtime tends towards zero. Of course, this also ensures great satisfaction among the employees when their software is highly available."

DAK has already planned further expansion of the software solution. For example, the insurance company will soon be upgrading to a higher version in order to be able to use even more functions.
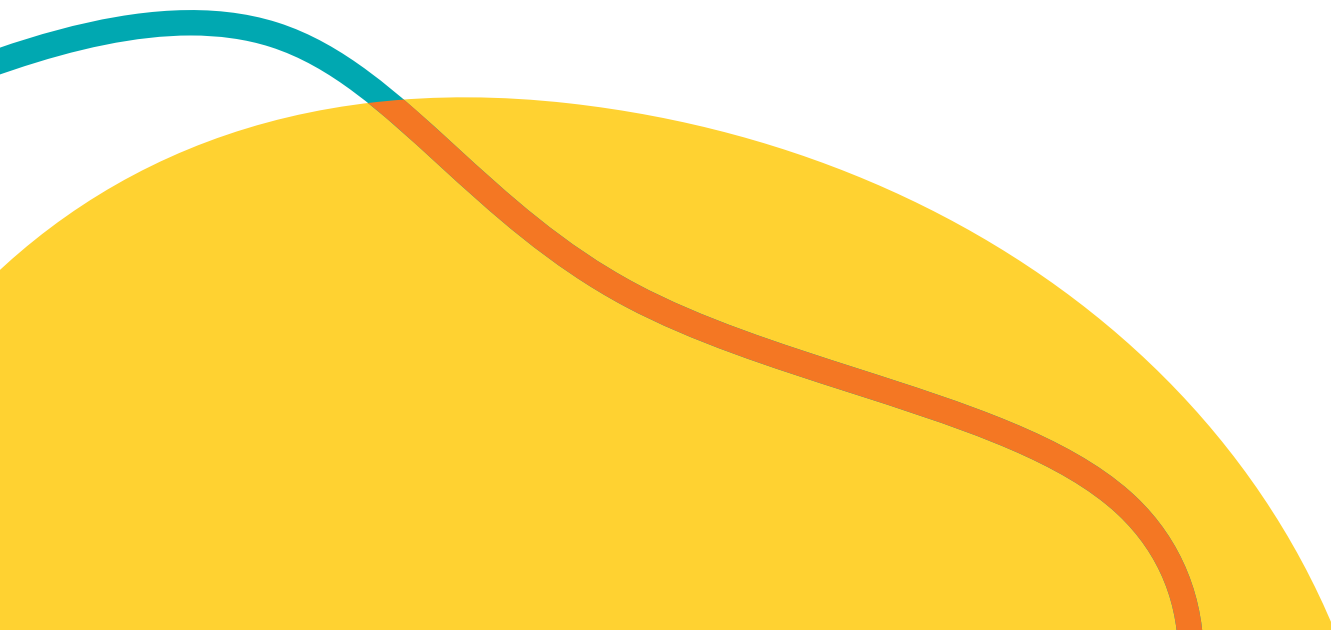
DAK Gesundheit

DAK-Gesundheit is based in Hamburg and is one of the largest statutory health insurance companies in Germany with 5.7 million insured persons, around 12,000 employees and 320 branches. In addition to providing high-quality care for its policy holders, it attaches particular importance to comprehensive customer service. Today's DAK-Gesundheit emerged from a merger of several health insurance companies. Its documented history dates back to the year 1774, which makes it the oldest health insurance company in Germany.

GREENFIELD
Technology Aktiengesellschaft

Greenfield Technology is based in Düsseldorf and is a successful implementation partner for Pega Technology. The company has been operational in the health care and public sector for many years. With extensive expertise in statutory health insurance, Greenfield successfully combines technology and business know-how and supports customers in complex digitisation processes.

PEGA®

We are Pegasystems, the leader in software for customer engagement and operational excellence. Our adaptive, cloud-architected software – built on the unified Pega Platform™ – empowers people to rapidly deploy and easily change applications to meet strategic business needs. Over our 35-year history, we've delivered award-winning capabilities in CRM and digital process automation (DPA), powered by advanced artificial intelligence and robotic automation, to help the world's leading brands achieve breakthrough business results.

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