



CRM – the success factor for exemplary consulting services



Customer

MLP Finanzdienstleistungen AG

Sector

Financial services

Role of ec4u

- Technical project management
- Process analysis
- Data modeling
- Implementation
- Integration of external systems
- Integration into existing IT landscape

Goals & benefits

- Technical project management
- A 360° view of all relevant data
- Centralized execution of campaigns
- Standardized sales processes
- Identification of potential business
- Activity management
- University management module
- Identification of need to contact clients
- Roles & rights across the company

Technologies

- Technical project management
- SAP CRM 5.0
- SAP Enterprise Portal 7.0
- SAP BI 7.0
- SAP Netweaver 2004s
- SAP XI
- SAP Solution Manager 4.0

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A new CRM platform launched at MLP has become a visible symbol of active customer relationship management. It bolsters MLP, a leading independent financial services advisor by enabling it to offer dedicated support to its group of over 2,600 advisors.

MLP AT THE TOP

MLP (Marschollek, Lautenschläger and Partners) is Europe's leading independent advisor offering financial and asset management services to academics and other demanding clients. MLP integrates banking and insurance services in financial concepts tailored to the needs of its clients. This comprehensive advice is molded to a client's financial needs at various stages of life. MLP serves over 720,000 clients through more than 2,600 advisors spread across Germany, Austria, and the Netherlands.

CRM – THE PRIME DIRECTIVE

With the launch of SAP CRM, MLP initiated a customized, Web-based development designed to mirror the success of its strategic CRM approach for sales. Simultaneously, it revamped its IT strategy to duly address market developments & perspectives, profitability, risk minimization in sales, and process optimization. Moreover, to maximize user acceptance, it applied user management, structure, and terminology principles to institute an easy to use, portal-based PC user interface.

THE SOLUTION?

PROCESSES, PROCESSES, PROCESSES

The system manages MLP's business partners. It handles existing and potential clients and producers. It focuses primarily on processes for supporting sales activities, campaign management, and customer analysis.

Each advisor can now directly import an electronic file on a client, containing details of all relevant applications and policies, from the respective producer. Integration of the university management module in the CRM system enables an advisor to offer targeted advice to acade-

mics. The database in the BI system is analyzed daily and evaluated in terms of set rules. The system automatically notifies the advisor for any need to hold a discussion with a client. Since transparency is the name of the game for advisory services, all processes comply fully with the guidelines for insurance intermediaries.

A LONG-TERM PARTNERSHIP

ec4u accompanied MLP every step of the way – from analysis through to full integration of the SAP CRM system into the existing IT landscape,

"CRM is our prime directive. ec4u comprehended this up front and implemented the system accordingly. We went live smoothly, because of the high level of commitment and demonstrated expertise of the ec4u team."

Klaus Strumberger, CIO
MLP Finanzdienstleistungen AG

followed by going live. MLP and ec4u will now work on optimization and adding functionalities, while a new release is already in the planning stage.