Aviva Life & Pensions Company in Turkey has been using SFS Insurance Presales and Service Management System since 2001

Collaborative Use

30 individual and 3 corporate contact centres in 17 cities, direct sales force of 976 financial advisers, 52 customer communication centre agents, direct sales team support unit, operation & logistics unit and corporate customers unit have all been using StraMar collaboratively since 2001. About 1750 financial planning analysis reports are being prepared, 1750 presales and sales activities are being entered and 1100 calls are being handled every day by StraMar.

Advantages

- Recognition of customers and defining their needs
- Financial consultancy service by financial analysis
- Follow up and improvement of sales processes by activity analysis
- New product development by trend analysis
- Customer Relationship Management by integrating sales and service processes

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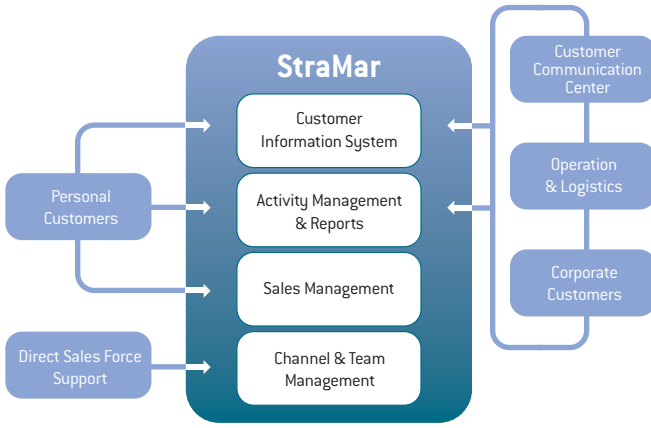
Integrated Sales, Service & Marketing Processes

Aviva is using StraMar not only in sales processes but also service & marketing processes. Presales, sales, after sales, service, marketing and customer communication centre activities are followed in a collaborative workflow by the activity management module.

Single Customer View

All proposals, illustrations of different products with their status are given in a single customer view. Activities of different departments about the customer (sales, service, and marketing) can be seen by all points of sales and points of service.

Products & New Product Development

All new products in different lines and specialized processes for them can be designed and introduced to StraMar by StraMar product designers without changing any software codes.

> Life

Individual
Individual Savings Products
  • Insured Savings Plan
  • Flexible Protection Plan
Individual Protection Products
  • Family Protection Plan
  • Family Total Protection Plan
  • Professional Protection Plan
  • Professional Total Protection Plan
  • Critical Illness Insurance

Corporate
Corporate Savings Products
  • Group Accumulation Plan
  • Group Saving Plan
Corporate Protection Products
  • Group Life Insurance
  • Group Critical Illness Insurance
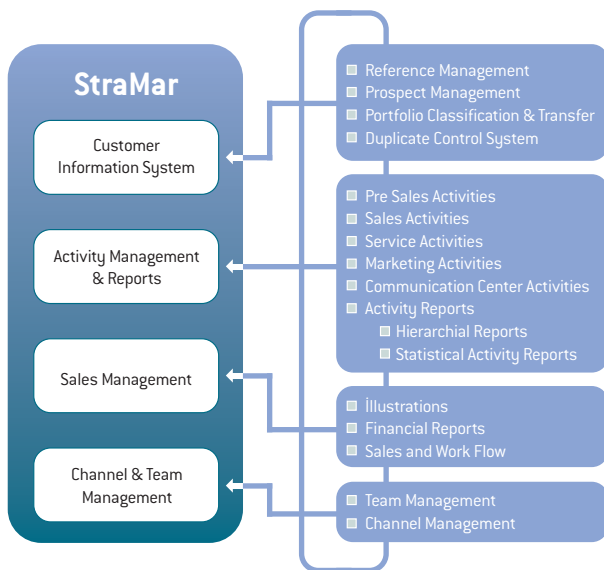
> Pension

Individual
  • Elmas Pension Plan
  • Turkuaz Pension Plan
  • Zümrüt Pension Plan

Corporate
Aviva Life & Pension has 83 of corporate pension plans approved by Treasury. All of the funds can be used by the group participants in corporate pension plans.

Personal Sales Process

All details and workflows for personal sales processes are followed up by StraMar.

StraMar

- Customer Information System
- Activity Management & Reports
- Sales Management
- Channel & Team Management

- Reference Management
- Prospect Management
- Portfolio Classification & Transfer
- Duplicate Control System

- Pre Sales Activities
- Sales Activities
- Service Activities
- Marketing Activities
- Communication Center Activities
- Activity Reports
  - Hierarchial Reports
  - Statistical Activity Reports

- İllustrations
- Financial Reports
- Sales and Work Flow

- Team Management
- Channel Management

Team & Channel Management

StraMar recognizes dynamic teams, organizations and multi

channels. In Aviva, financial consultants are reporting to sales managers, sales managers are reporting to channel managers and channel managers are reporting to district managers. Each team has different leaders and members. By StraMar, Aviva can follow all the changes in teams and channels and their performance with different reports.

Share of Customer Information & Customer Hints

Documents sent to the customer can return back to the company. It may be a hint from the customer to learn about his movement from city. When the returned documents are entered by the administrative team, the system delivers it to the communication center outbound. When the agent call and learn about customer's move, the system automatically informs the financial consultant who is responsible from the customer in the city where the customer had lived previously and informs the other city district office to assign a suitable financial consultant.

Prospect/ Customer Control > Appointment Setup > First Meeting (Need Analysis) > Financial Planning Analysis > Illustration Preparation > Second and Other Meetings > Sales > After Sales Activities

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Point Of Service & Multi Channel Structure

All inbound and outbound services are followed up by
StraMar in Aviva's customer communication center. Calls
are taken, customer requests are examined and activity
process is started. Activities are entered or assigned to
others allowing working collaboratively. Activity statuses
are updated and completed tasks are examined. Requests
are closed with changing the status of activities. In each
phase, reports can be taken by people and team.

Technical Architecture

Microsoft Internet Information Server - UNIX Oracle - Full
thin clients (Internet Explorer)

Sağlam Fikir Sokak No:5

Esentepe 34394 İstanbul Turkey

Tel   : +90(212)216 27 80

Fax   : +90(212)274 72 98

www.sfs.com.tr