

IN SEARCH OF
CUSTOMER EQUITY

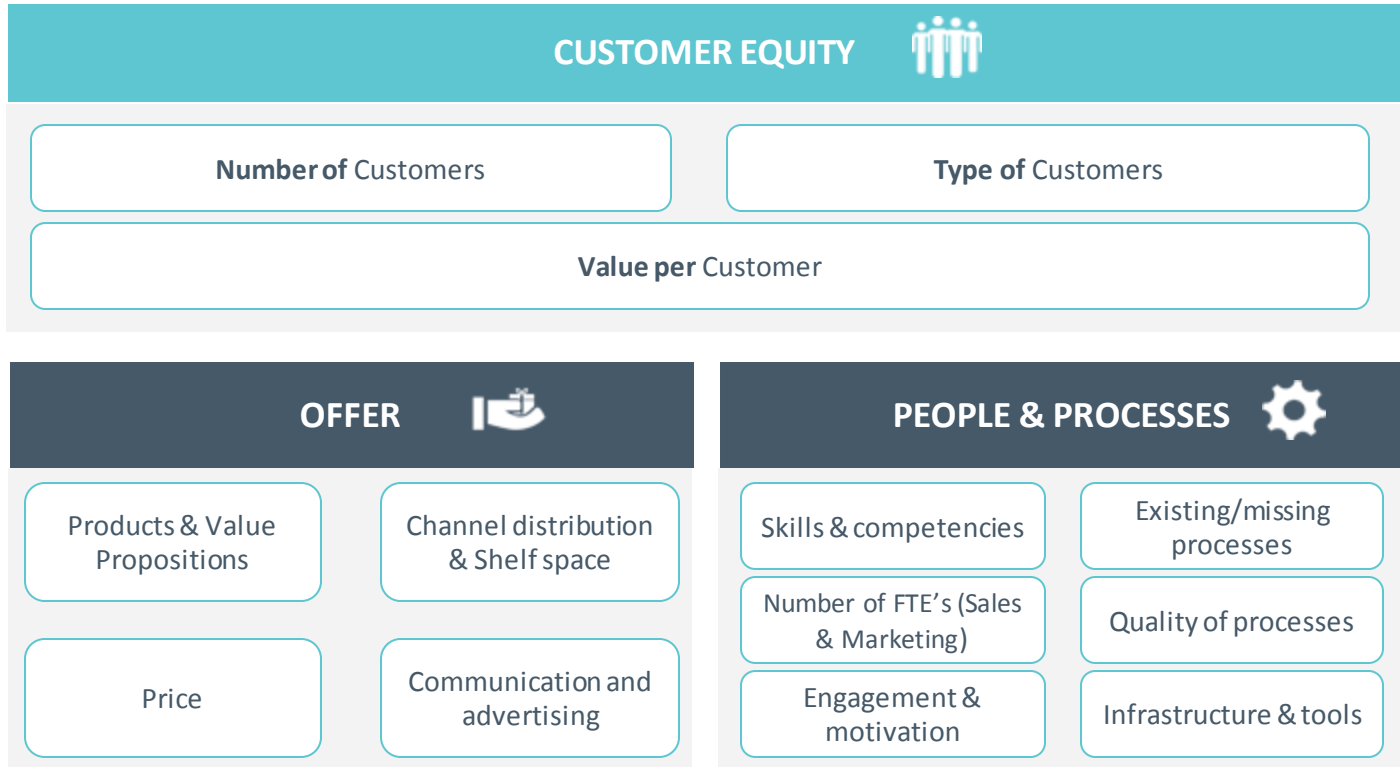
IZZY VAN AELST



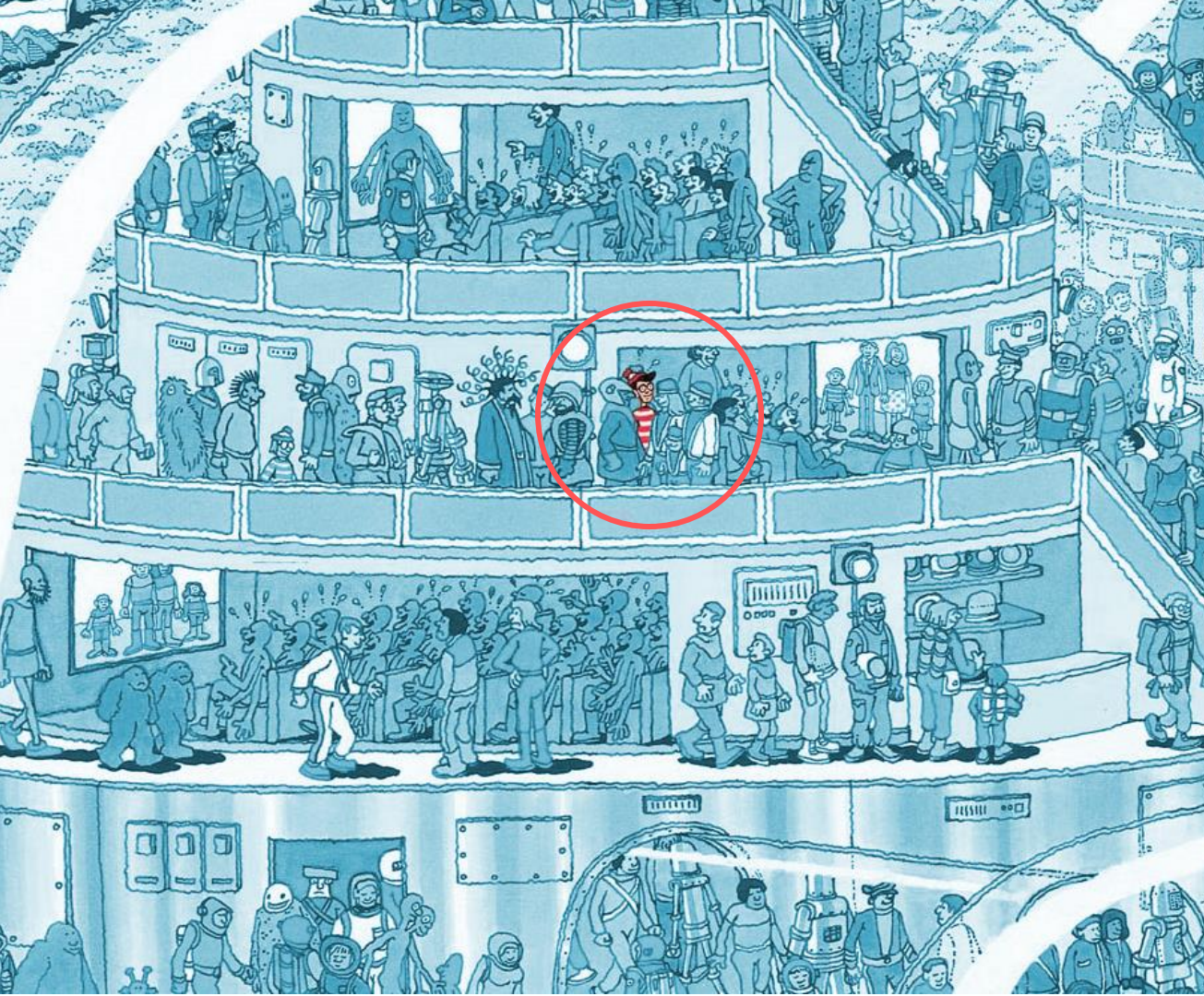
Senior Insurance Marketing Expert
IZZY VAN AELST



Commercial development



We are looking for The Super Client



1

Sum **net profit** of all Customers

2

Current Customer Value
Potential Customer Value

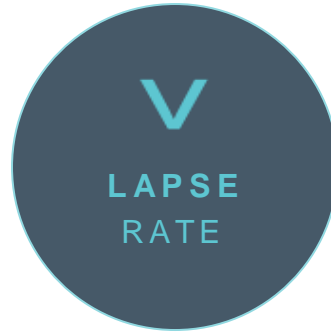
3

Current Customer Value
Potential Lifetime Customer Value



BUSINESS OBJECTIVE
Sales Time optimization

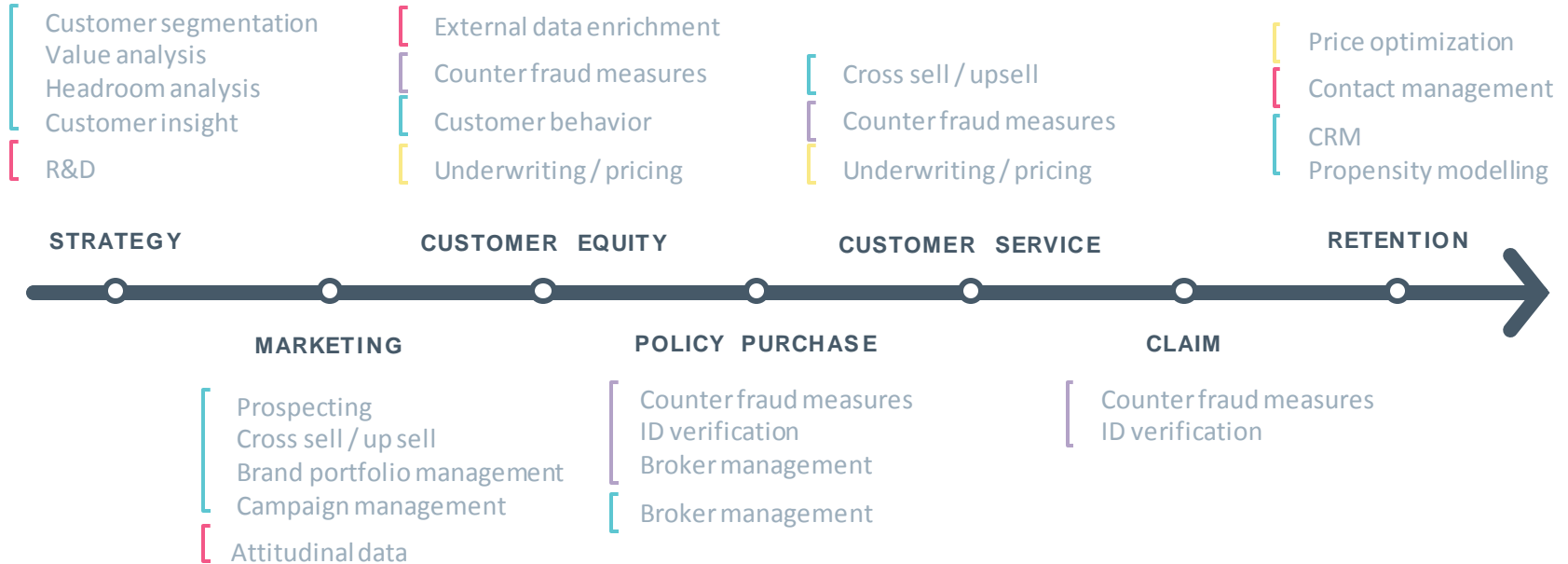
BUSINESS OBJECTIVE | Sales Time optimization



- Increase/structure available **data**
- **Finetune KPI** selection
- Automate **WHAT** KPIs through dashboarding
- Increase marketing team allocation to the **WHY**

- Adapt **product offer**
- Finetune **lead selection**
- Optimize **sales processes**
- Steer **sales focus**

BUSINESS OBJECTIVE | Sales Time optimization



Customer and marketing analytics • Pricing and underwriting • Fraud • Business Intelligence • Risk

APPROACH | Industrialization of the commercial process

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COMMERCIAL PERFORMANCE

GWP
Policies
Avg Premium
Lapse rate
Penetration

How much do we sell ?
What do we sell ?
Who is selling it ?

WHAT

SALES FLOW ANALYSIS

Sales contacts
Sales offers
Policy contracts
Active Policies

Sales Effort
Sales Process
Product Offer

WHY

CUSTOMER INTELLIGENCE

Number of customers
Type of customers
Customer Value
(Possession, Claims, Segment)

Who are my clients ?
What are their needs ?
What solutions are they willing to pay for?
How do I engage with them ?

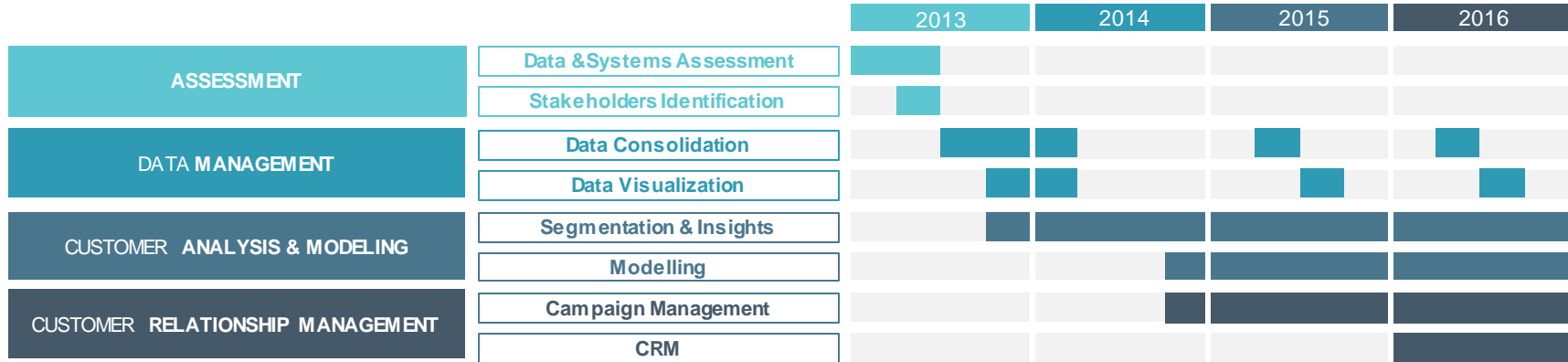
WHY

**Setting up data analytics
is a sequential process**

Setting up data analytics is a sequential process

OCIDENTAL
SEGUROS

PROJECT ROADMAP



Result 1 | Customer data consolidation



Client Overview
Socio Demographics

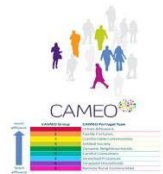
Policy Portfolio

Policy Coverage

Insured object



CAMEO
Segmentation



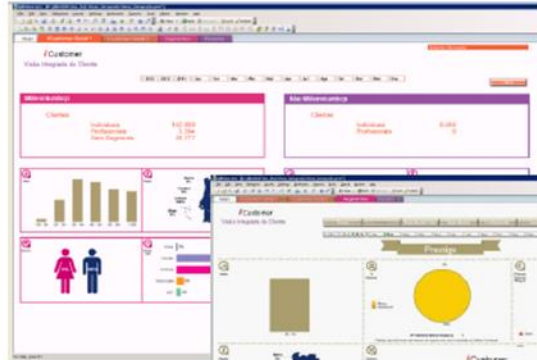
Claims



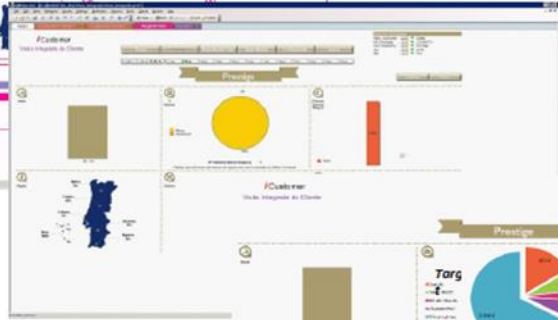
Third Party Data
Campaigns

OCIDENTAL
SEGUROS

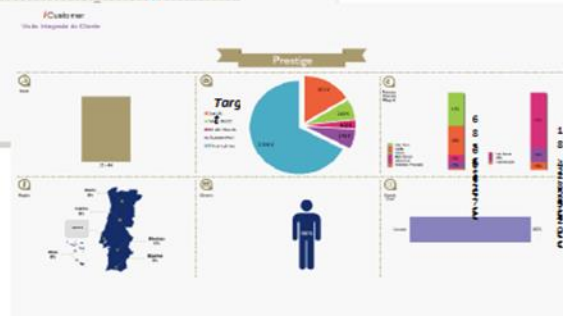
Result 2 | iCustomer (single customer view)



✓ General Overview of all
Clients in Portfolio



✓ General Overview
per Client Segment



✓ Detail Information
Client by Client

iCustomer
BUSINESS PIPELINE

REPORTING
PLANNING TOOL

REACTIVE
RETENTION STRATEGY

CAMPAIGN SUPPORT

RETENTION ANALYSIS
CUSTOMIZED
REPORTS

CAMPAIGN
SUPPORT

KPIS FOR SIR
DATA
MART
MIGRATION
PROJECT

MICRO SITES

**Setting up data analytics
is a multi disciplinary process**

Setting up data analytics is a multi disciplinary process



**DATA
DEVELOPER**



**DATA
MODELER**



**CRM
MANAGER**



**DATA
VISUALIZER**



**BUSINESS
STRATEGIST**



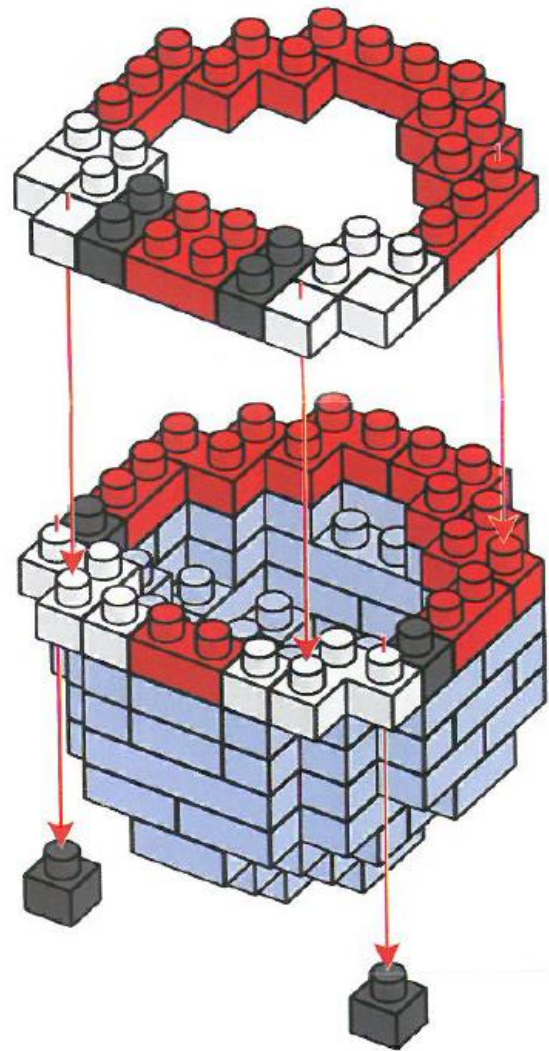
Associate Business Analytics Consultant
BRUNO COELHO



TEMOS TUDO...

MAS NÃO SABEMOS POR ONDE COMEÇAR

FELIZMENTE NÃO PRECISAMOS DE...
REINVENTAR A RODA





TEMOS PEÇAS DIFERENTES...
PRECISAMOS DE MÃOS DIFERENTES



AGORA JÁ PODEMOS ACELERAR O PASSO...

COM O SAS

 CROSS-SELL

 UP-SELL

 CHURN

 CLAIMS



AS MESMAS PEÇAS...
RESULTADOS DIFERENTES

MIND  SOURCE
All the pieces to decide!