

# Success Story

## ALTE LEIPZIGER – Optimizing services with an agent portal

Satisfied agents and increased sales productivity — ALTE LEIPZIGER has achieved both with a new portal that delivers a wealth of online information to its business partners. Livelink® ECM – Web Content Management (WCM) Server™, an innovative tool from Open Text™, provides agents and brokers of the insurance company with immediate and direct access to all information and documents they need for their daily work.

“Our agent portal strengthens the relationship with our brokers, reduces expenses, and generates more revenue. The document management system and Livelink ECM – WCM Server are important elements of the overall solution.”

**Claudia Rettinger,**  
Project Leader for Portal Development,  
ALTE LEIPZIGER

### Organization

With revenues of 2.8 billion euro, capital assets of nearly 20 billion euro, and approximately 3,000 employees, ALTE LEIPZIGER - HALLESCHE is one of Germany's most renowned mid-sized financial services and insurance groups. It provides tailored solutions for both individual and corporate customers. The product and service offering includes life, health, and property insurance, savings and loan services and investments.

### Situation

It is an increasingly common practice that insurance policies are sold by brokers and independent agents who hold a variety of product offerings from several companies in their portfolios. ALTE LEIPZIGER generates approximately 80 percent of its revenues through this sales channel; consequently, the company's success is largely dependent on the loyalty of its agents. To optimize the services it offers to its brokers and agents, and to gain a competitive edge, ALTE LEIPZIGER has turned to ECM technology.

### Solution

Livelink ECM – WCM Server, a Web content management solution from Open Text, provides the foundation for easy and efficient in-house management of the editorial content of the ALTE LEIPZIGER Web site. Currently, twenty writers and six editors create product information and news items about the company and the insurance industry, and then simply update or add this content to the Web site. Thanks to the Open Text solution, the effort needed to maintain these pages is kept to an absolute minimum. A new personalization function has also been implemented, which enables the agents to set content preferences that meet their needs.

Livelink ECM – WCM Server and the document management solution from Open Text are integrated into the overall system using ALTE LEIPZIGER's custom-developed .NET technology. The document management solution provides agents with immediate access to all current documents in an insurance policy folder. These documents include policies sent, damage claims received, and any scanned correspondence. At the touch of a button, agents can view all printed material such as application forms, contract terms and conditions, and product brochures. The documents can also be downloaded, printed out or ordered online. “We have been using Open Text successfully for years to optimize our office workflows,” explains Claudia Rettinger, Project Leader for Portal Development at ALTE LEIPZIGER. “The high scalability, performance, and flexible integration convinced us to choose Open Text for our agent portal as well.”

Another highlight of the extranet solution is the Web-based access to customer, contract, and transaction-data generated by various back-end applications. This functionality allows agents to work with customer data directly through the portal interface.

### Industry

Insurance and Financial Service

### Customer



## ALTE LEIPZIGER

### Business Challenges

- Optimize services for business partners
- Improve consulting services for customers
- Eliminate stacks of paper documents

### Business Solution

- Livelink ECM – Web Content Management Server

### Business Benefits

- Increased broker loyalty and customer satisfaction
- Enhanced consulting services
- Reduced administrative overhead
- Quick and easy access to important documents
- Simple management of Web content: no technical expertise required

**Benefits**

Insurance business processes can be rather complex. Thanks to Livelink ECM – WCM Server, agents have direct and immediate access to the very latest information on products, rates, and the insurance industry, and are thus able to conduct more knowledgeable and effective sales presentations. The advantages to ALTE LEIPZIGER are obvious: the improved quality of services increases agent satisfaction, thus intensifying agent loyalty to the company. At the same time, the Open Text solution enhances ALTE LEIPZIGER's corporate image as an innovative, communicative provider of insurance services. The financial company benefits by attracting more agents, which in turn has the effect of winning more new customers.

In the past, ALTE LEIPZIGER mailed out vast numbers of paper documents and many information-laden discs to their brokers and agents. Missing forms and product brochures had to be ordered by phone or by fax. Several days usually elapsed before the agent finally received the necessary documents. Today, as fewer documents are sent out by mail and as the number of broker requests has significantly decreased, the company's resources can be focused on more essential work aspects. "The agent portal will also help ALTE LEIPZIGER reduce expenses and thereby improve our competitiveness," emphasizes Rettinger.



ALTE LEIPZIGER's new portal was just what everyone needed, as has been quite clearly demonstrated in a survey of 105 agents. "Sixty percent of the users reported using the portal at least once a week, and at least twenty-five percent use it every day," explains Rettinger. "More than half of the agents say that our extranet solution makes their job easier."



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