



## MLP FINANZDIENSTLEISTUNGEN

### SAP® CUSTOMER RELATIONSHIP MANAGEMENT HELPS INCREASE REVENUE, LOWER COSTS

“With SAP CRM sales functionality, we have measured a definite increase in activity management. More activity management leads to more appointments with customers . . . higher customer value and more revenue growth.”

**Klaus Strumberger**, CIO,  
MLP Finanzdienstleistungen AG

#### QUICK FACTS

##### Company

- Name: MLP Finanzdienstleistungen AG
- Location: Wiesloch, Germany
- Industry: Banking
- Products and services: Banking and insurance
- Revenue: €637.1 million
- Employees: 4,400
- Web site: [www.mlp.de](http://www.mlp.de)
- Implementation partner: ec4u expert consulting ag (Karlsruhe, Germany)

##### Challenges and Opportunities

- Create targeted marketing campaigns
- Enhance consultant performance

##### Objective

Implement customer relationship management (CRM) functionality with business intelligence software and portal to support activity management and marketing initiatives

##### SAP® Solution and Services

SAP® Customer Relationship Management application (sales functionality)

##### Implementation Highlights

- Implemented software on time
- Focused on usability
- Involved extensive analysis of business processes
- Adopted an iterative approach, with short feedback cycles
- Involved extensive user and integration testing

##### Why SAP

- Functional excellence, especially around activity management
- Simplicity of user interface
- Solution openness, enabling integration

##### Benefits

- Increased activity management, resulting in more customer appointments
- Ability to create optimal offers to meet customers' needs, leading to greater customer value and revenue growth
- Reduced administrative workload and costs

##### Existing Environment

- SAP ERP application
- SAP NetWeaver® technology platform
- SAP Incentive and Commission Management application
- SAP Document Access application by Open Text
- SAP ERP Human Capital Management solution

##### Third-Party Integration

- Database: Hosted solution
- Hardware: Hosted solution
- Operating system: Hosted solution



“We are a customer relationship management company,” says Klaus Strumberger, CIO at MLP Finanzdienstleistungen AG – which is a financial services company. But Strumberger isn’t talking about his firm’s products and services; he is referring to the company’s philosophy and the way it works closely with clients to understand and meet their needs. That’s why MLP chose the SAP® Customer Relationship Management (SAP CRM) application and its sales functionality.

MLP’s financial consultants use SAP CRM to manage customer-related activities, taking advantage of a bidirectional interface between the SAP software and Lotus Notes to synchronize appointments, customer data, and documentation. Automated reminders alert them to upcoming appointments or additional marketing opportunities. In the office at MLP’s Wiesloch, Germany–

erate tailored versions that more precisely target their customers’ specific profiles, taking into account variables such as profession, age, marital status, and so on to create the optimal offers.

Strumberger says, “With our integrated solution, our consultants can easily determine the right time to approach the customer about the right product. The

“The SAP Customer Relationship Management application has strong features to support our business, particularly around activity management.”

**Klaus Strumberger**, CIO, MLP Finanzdienstleistungen AG

based headquarters, employees use SAP CRM in conjunction with an internally developed policy management system to analyze customer data for creating marketing campaigns.

MLP integrated SAP CRM with the SAP NetWeaver® Portal and the SAP NetWeaver Business Intelligence components. This enables the consultants to use the centrally created campaigns as a starting point; they can then gen-

software not only provides consultants with reminders, it enables them to optimally organize customer data and analytics. With a transparent, 360-degree view of each client, the consultant can deliver personalized service. This builds trust with the customer, who realizes that he or she is dealing with somebody very skilled and very competent.”

Someone, also, who has the time to look after customer interests. MLP

estimates that consultants typically spend 25% of their time directly consulting with each customer. Even when new federal reporting regulations increased their administrative workloads, the consultants using SAP CRM easily handled the new requirements and still had ample time to spend with clients.

“With SAP CRM sales functionality, we have measured a definite increase in activity management,” Strumberger says. “More activity management leads to more appointments with customers. If we have more appointments, we realize higher customer value and more revenue growth, because we now have the ability to accurately target customer segments with relevant product recommendations.”

### Customized Financial Services

MLP is the leading financial services supplier for professionals in Europe. The company integrates banking, insurance, pension, and investment services into a financial strategy tailored to each customer at each stage of life. Individual consultants focus on specific professional groups, enabling them to address their clients’ unique issues. With offices in Austria, Germany, and the Netherlands, over 2,500 MLP consultants support more than 730,000 clients.

MLP was previously using an application developed in-house to manage customer relationships. “It was difficult to add functionality to the software,” Strumberger says. “We had to make a decision to either develop a new solution ourselves or buy it from a vendor. Our core competency is not around



“One of the strengths of SAP CRM is its openness.”

**Klaus Strumberger**  
CIO  
MLP Finanzdienstleistungen AG

software but around implementing business processes that support our company. We realized that if we purchased standard software, we could roll out the new functionality we needed much more quickly. It was a time-to-market issue.”

### **SAP CRM: Functional Excellence, Tight Integration**

MLP evaluated a number of vendors. SAP CRM stood out for its functional excellence. “The SAP Customer Relationship Management application has strong features to support our

### **Implementation Focus on Usability**

MLP picked ec4u expert consulting ag (Karlsruhe, Germany) as its implementation partner. ec4u specializes in CRM business consulting, rollout, support, and software development. “ec4u understood our needs and issues and was able to bring a lot of SAP CRM know-how to the project,” Strumberger says. “It was a good partnership. Both companies communicated openly and worked very well together. We shared a common goal. This was a big success factor for the project, which came in on time and within budget.”

Strumberger says. “We made sure it was very easy for them to use. This is very important because the consultants are not technical specialists. They need to focus on providing financial guidance to their customers. It is crucial that the software be intuitive and easy to use.”

### **Portal Access to Business Intelligence**

Financial consultants log on through the portal to work with customer information, leveraging the integration between SAP CRM and SAP NetWeaver Business intelligence to analyze the data and build the customized reports. Says Strumberger, “A lot of our competitors don’t have this feature. This is easy for us to do, and it demonstrates to the customer that our consultants are professional and that we are a good service provider.”

“SAP Customer Relationship Management has enabled us to become better and faster as a business.”

**Klaus Strumberger**, CIO, MLP Finanzdienstleistungen AG

business, particularly around activity management,” Strumberger says. “We also liked the usability of the interface and how easy it was to manage customer information.”

In addition to functionality, MLP examined the openness and integration potential of each vendor’s solution. “We also chose SAP CRM because we already had a lot of SAP software solutions in our company, such as the SAP NetWeaver Portal, SAP NetWeaver Business Intelligence, and SAP NetWeaver Exchange Infrastructure components,” Strumberger says. “We saw that it would be much easier to integrate SAP CRM with these existing components.”

The implementation began with an extensive analysis of MLP business processes. The team then compared them to SAP CRM business flows. Decisions were made on each one – to either standardize the process with SAP CRM or adapt SAP CRM to the MLP process. The prototyping stage featured an iterative approach, with short feedback cycles. Next came user and integration testing, then final realization, which included process configuration, interface development, performance tuning, and incorporation of user feedback into the final solution.

The implementation emphasized usability. “We worked closely with our financial consultants during testing to get their feedback on the interface,”

The consultants use Lotus Notes to organize their schedules and make appointment notes; they then synchronize the data with SAP CRM. “When consultants log into SAP CRM, they are automatically presented with a to-do list for that particular day,” says Strumberger. “These automated reminders are based on predefined information and rules in SAP CRM activity management.”

MLP also integrated SAP CRM with the SAP Document Access application by Open Text. The enterprise content management software incorporates imaging with data and document archiving. “This allows us to scan customer documents, as well as transfer customer e-mails, into SAP CRM,” Strumberger

says. "This information then appears in the electronic customer file, so consultants can view business documents and data across SAP and non-SAP applications through the portal."

### **Straightforward Integration**

MLP also integrated SAP CRM with its own internally developed policy management software. Says Strumberger, "One of the strengths of SAP CRM is its openness. It was very straightforward to connect SAP CRM with the policy software using SAP NetWeaver Exchange Infrastructure."

MLP also integrated SAP CRM with the SAP Incentive and Commission Management application and the SAP ERP Human Capital Management solution (SAP ERP HCM). "We have a very large installation of SAP Incentive and Commission Management across our operations," Strumberger says. "When we hire consultants, we enter their information in SAP ERP HCM; we also maintain the consultant contracts in the HCM solution, with rules for determining commissions. The tight integration between SAP ERP HCM and SAP Incentive and Commission Management enables managers to automatically calculate the correct commission."

### **Enabler for Business Improvement**

With SAP CRM, MLP feels it can now further improve its business to become more competitive in the financial services sector. "SAP CRM helps us optimize our business processes to reduce costs," Strumberger says. "This is crucial to gaining market share. SAP Customer Relationship Management has enabled us to become better and faster as a business and to implement new functionality much more quickly to support our consultants."

MLP next plans to use SAP CRM to drill down further into customer information to enable even more detailed marketing initiatives. It wants to use SAP CRM to support computer telephony at its service center. It's also looking forward to upgrading the customer relationship management software. "We saw a demonstration of the latest version of SAP CRM," Strumberger says. "The user interface is even better, and integration is stronger. In the newest generation of the SAP application, we see more possibilities to decrease costs through further optimization of our business processes."



50 091 219 (08/09)

©2008 by SAP AG.

All rights reserved. SAP, R/3, xApps, xApp, SAP NetWeaver, Duet, PartnerEdge, ByDesign, SAP Business ByDesign, and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP AG in Germany and in several other countries all over the world.

Business Objects and the Business Objects logo, BusinessObjects, Crystal Reports, Crystal Decisions, Web Intelligence, Xcelsius and other Business Objects products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of Business Objects S.A. in the United States and in several other countries. Business Objects is an SAP Company.

All other product and service names mentioned are the trademarks of their respective companies. Data contained in this document serves informational purposes only. National product specifications may vary.

These materials are subject to change without notice. These materials are provided by SAP AG and its affiliated companies ("SAP Group") for informational purposes only, without representation or warranty of any kind, and SAP Group shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP Group products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.