

# Insurance company using Qollabi

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# Situation

## Distribution of insurance products through 300 sales agents

This insurance company distributes **life** and **non-life** insurance products through a channel of around **300 tied agents**, managed by **20 account managers** divided over several geographical regions.

Headquarters is well equipped with an **internal marketing** and **sales team** supporting account managers and agents with support material, coaching and marketing campaigns.

They also have an extensive team of **data scientists** providing loads of data.

The company also processes **online leads** through its indirect sales network.



# Challenge

## **Business Plans Made in Excel and Powerpoint and rarely updated.**

The insurance company faced some of the following challenges before using Qollabi:

- ➡ Our account managers all have a different approach, we don't know which one is the best?
- ➡ We make business plans in Excel and Powerpoint at the end of the year.
- ➡ Updating Excel sheets takes time looking for data in CRM and other sources.
- ➡ Throughout the year it is hard to follow through on the business plan.
- ➡ All our agents are different, so it's difficult to apply a segmentation that makes sense.
- ➡ We don't know which (support) activities have an impact on sales.
- ➡ We have so many data but we don't use it.
- ➡ We want to become a more strategic partner for our agents but we don't know how.



# Solution

## One way of working leading to more efficiency and business partner impact.



Business Plans are **centralized and unified** in Qollabi.



CRM Data connected to Qollabi **provides** an instant overview of the most important objectives and the underlying actions and activities.



New **agent segmentation** based on two axes: potential and willingness to collaborate.



Standardized way of working for all account managers based on three steps: **plan, collaborate, measure.**

Implementing this new strategy, the company declares **an uplift** of more than 10% in terms of efficiency and productivity after a successful implementation of Qollabi.

## What end customers say about Qollabi

“Qollabi helps us to focus on the right energy, at the right time, on the right account/customer”

***Wim Noordijk***  
***Baloise Insurance***

“BRM is important as it helps channel account managers to stay focused on well-defined and discussed priorities”

***Rudi Lenarts***  
***Deltalink***

“We need a tool to be more pro-active towards our distributors and our/their business development”

***Katrien Seuntjes***  
***Coolio International***

“Qollabi allows us to work together on clear goals with concrete follow-up”

***Patrick Rondelez***  
***Belfius Insurance***

*BRM is important for us because it's the missing link between facilitating the management of activities (the HOW) and the objectives one wants to achieve (the WHAT).*

Want to discover how Qollabi can help you? Schedule a discovery demo with one of our team members specialized in the financial industry.



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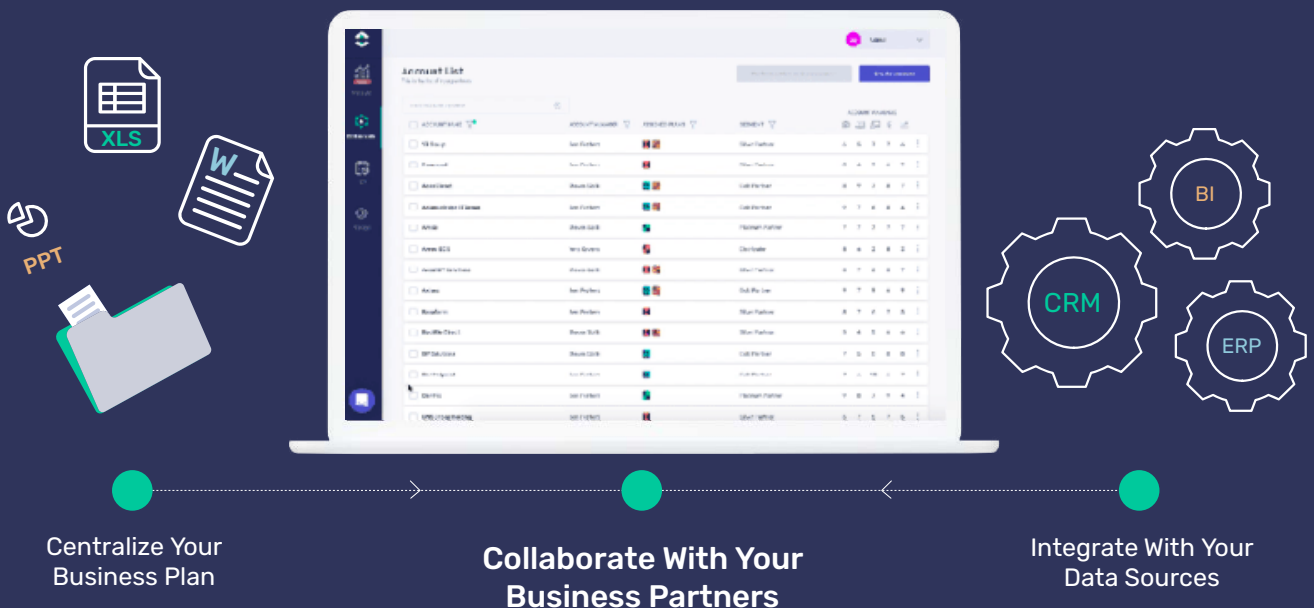
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**Get a free demo now**

# Welcome to a New World of Partner Collaboration

Qollabi BRM software is designed for companies working with agents, branches, distributors, dealers, brokers, resellers etc.



Features

Ask a Demo

qollabi

# About us

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Qollabi helps you to build stronger relationships with your business partners. We call our software BRM: Business Relationship Management Software.

We especially developed it for professionals managing indirect sales channels like agents, branches, distributors, dealers, brokers, resellers etc.

Our customers choose Qollabi BRM because of increased commitment and accountability. Both, within their own organization as between them and their business partners. Want to know more? [Discover what Qollabi](#) can do for you.



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