

# Baloise using Qollabi



# Situation

## Overview Baloise

Baloise Insurance is one of the **market leaders** in the **non-life insurance** segment in Belgium. The organization is also leading in **maritime & transport insurance** and has a 3% market share in the **life insurance** segment.

Baloise aims to be **digital** wherever possible, but always with a **human approach**. The company stands out in its commitment to be a performant & durable organization towards its partners & independent agents.



# Challenge

## Challenge: complex & cumbersome commercial plans in spreadsheets

Before working with Qollabi, Baloise used Excel files to manage their **commercial plans** with its network of independent agents & brokers.

However, they recognized the **challenges** that came along with working in static spreadsheets:

- ➔ Loss of time updating spreadsheets & error-prone manual updates.
- ➔ Lack of structured follow-ups & lack of overview on activities that need execution.
- ➔ Lack of strategic focus & strategic coaching of account managers and brokers.

Combined with the mission to be digital wherever possible, Baloise decided to implement **software** that centralizes the commercial planning process with independent agents & brokers.



# Solution

## Digitized & centralized commercial plans connected to internal data sources

Qollabi helps Baloise to achieve their digital agenda for commercial planning on **different levels**, for example:

- ➡ All independent agents & commercial plans centralized in one platform.
- ➡ A unified planning framework based on Objectives & Key Results (OKRs).
- ➡ Automated updates.

The most significant benefits can be summarized in **3 areas**:

- ➡ Increased partner productivity due to strategic & effective follow-ups with the most important agents & brokers.
- ➡ Structured way of working allowing better monitoring and steering.
- ➡ Efficient coaching of account managers based on a clear status overview.



# Future

## Sneak peak in the future:

How do the commercial managers of Baloise look at the future of **partner collaboration** and what would be the role of Qollabi ?

"Due to the consolidation of insurers and brokers the collaboration with certain partners will be more intense and joint business planning will be considerably more important".



**Frank Cnudde**

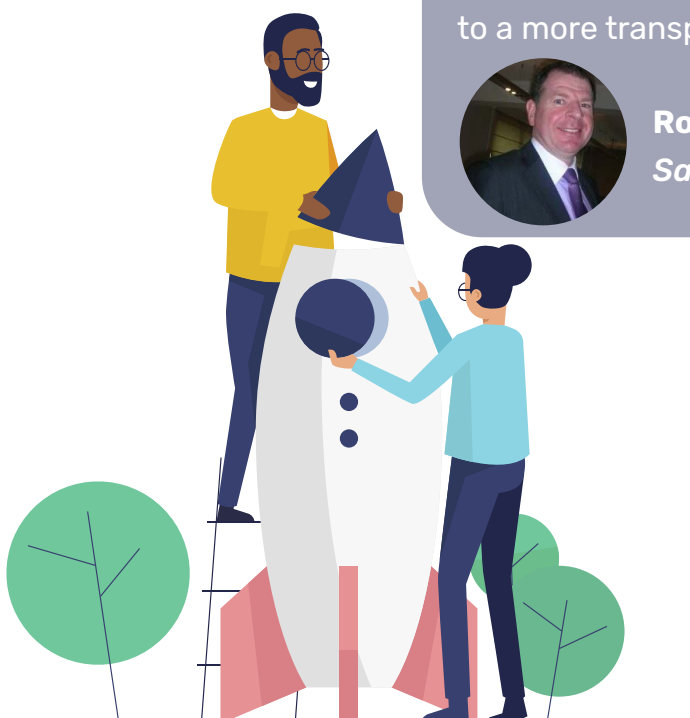
*Sales Manager Corporate Brokers, Baloise*

"I'd like to experience a more open & honest conversation with our partners. Now we still see reluctance in disagreeing with certain items in the plans. Therefore, we'd like to move to a more transparent relationship with our partners"



**Ronny Naessens**

*Sales Manager Retail Life, Baloise*



# Make your partner success more predictable

Qollabi's goal to make joint action plans more predictable is based on **3 building blocks**.



## Plan: uniform planning framework based on OKRs

Eliminate your static commercial plans in spreadsheets & templates. Qollabi transforms planning into a **dynamic exercise** using an **OKR-framework** (Objectives & Key Results).



## Collaborate: joint partner planning

The future of partner collaboration is about **involving your partners** and define **mutual strategic goals**. Install commitment & have effective follow-ups on a joint business & action plan.



## Measure: integrate data sources and define next best actions

Spend **less time** updating your numbers as Qollabi is an open-API platform that integrates with existing data sources such as CRM, BI, partner portals...

Connected with **different data sources**, Qollabi guides you to define next best actions.

[Ask a Demo](#)

See how Qollabi can  
can help your company

# Welcome to a New World of Partner Collaboration

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

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



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# 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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