

# Act! boosts customer satisfaction and specialist pension company benefits

act!™

When your reputation in a specialist financial market depends on the quality and independence of your advice, you need to make sure your company delivers the highest levels of customer satisfaction possible.

MVM

Unlike most other providers in the German company pensions market, Münchner Versorgungsmanagement AG (MVM) charges fees for the advice it gives, rather than earning commissions from product sales.

To ensure that its clients are comfortable with this non-standard arrangement, MVM must develop and maintain the **highest levels of customer service**. As MVM's CEO Micha Martin Lauterjung puts it: "Our top priority is the client and an understanding of their needs."

"When every other small mortgage broker is embracing technology, I believe that Act! gives me an edge."

**Paul Barden**

Owner, Barden Financial Services

However, the company's historic system of databases and Excel® spreadsheets to record client information, and mail-merge to personalize communication with them, was proving increasingly unwieldy for effective customer relationship management. Finding or recording information was difficult without access to up-to-date account data, or any way to easily and conveniently capture the details of on-going conversations and interactions with clients.

## Shareable up-to-the-minute information

For a company so reliant on the highest levels of customer service, this was not only frustrating, but also potentially damaging to the business.

With an urgent need to improve the efficiency of both customer service and marketing, as well as enable sales staff to capture every detail of client conversations without having to rely on their memory or personal notes, Martin and his team began searching for a **reliable and flexible** CRM system.

### **The most comprehensive option**

After looking at many possible solutions, most of which had similar functions, “we felt our **requirements were met** most comprehensively by Act!,” says Martin.

Act! gave MVM **exactly what they were looking for**: a network-compatible customer database that included conversation logs and convenient search facilities, and was also compact and not overly complex to use. As Martin says: “A perfect fit for our company.”

With Act! chosen as their preferred CRM system, MVM worked with a local Act! Certified Consultant (ACC) to take them through all aspects of the roll-out process, from installation, configuration and customization of forms, through to results analysis and the implementation of add-ons, as well as fine tuning of user interfaces so they were **tailor-made for MVM’s exact needs**.



## Act! provides insight and understanding

The ACC was particularly important in providing the **insight and understanding** MVM needed to get the most from Act! right from the start. And in terms of streamlining office procedures and helping manage the business even more efficiently, Act! has already far exceeded expectations.

“Originally we were only looking for software for customer administration,” says Martin, “but what we actually got was a **sophisticated customer management system** complete with analysis modules and reporting that allows us to assess more accurately the success of our marketing activities.”

Now MVM’s employees can log in easily across the network not just for customer and contact management, but also to access what is effectively a complete document management system.

With Act! in place, this market-leading specialist independent financial firm has **enhanced its reputation** for its excellent support of both customers and business partners, a platform it will be building from with future plans to raise its profile even further.



## Results

- By enabling employees to share vital customer information across the entire company, Act! has helped MVM **improve the transparency** of its client relationships.
- Act! has allowed MVM to configure individual business processes to their **precise requirements**, making the company more efficient and profitable.
- The reports that Act! is able to generate about the success of individual campaigns mean that marketing activities can be **optimally targeted**.
- The higher level of customer satisfaction is reflected in the **increase in revenues** and number of employees, with Act! making a **significant contribution to that success**, according to CEO Micha Martin Lauterjung.

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