

act!™

Act! CRM helps financial firm get personal

This financial services firm may have been providing advice to clients for nearly 30 years, but it has only just started using Act! CRM and is already seeing the benefits as it takes advantage of new opportunities previously missed.

Bert  Ritsema
verzekeringen & hypotheek

“ With Act! CRM, we have insights into a client’s situation that we didn’t have before.”

Corné Ritsema

Executive, Bert Ritsema Verzekeringen & Hypotheken

In an industry that has become increasingly depersonalised, mortgage, insurance and loan specialists Bert Ritsema Verzekeringen & Hypotheken are determined to maintain the ‘human touch’.

So, while others cut opening hours, close offices and move services online, this financial services firm is more than happy to visit clients outside normal working hours, if they want.

“While we use the internet, it’s not at the expense of personal contact,” says Corné Ritsema, one of the firm’s executives.

However, with more and more people looking for financial advice, the firm needed a better way to collect, manage and organise client information. After researching the market, they chose Act! CRM to help them do that.

A single, flexible CRM system

“Many of our clients need a number of financial products and services,” says Corné, “so we had to have a single platform with the flexibility to handle the requirements of different departments. Act! CRM gives us that.”

Because Act! CRM does away with the separate systems they previously used, Bert Ritsema Verzekeringen & Hypotheken can now provide a more joined-up, efficient service that’s even better for their clients.

Although the business has only just begun using Act! CRM, they have immediately seen the benefits as they uncover opportunities for new business that they didn’t even know were there.

“We have insights into a client’s situation that we didn’t have before. For example, we now know if someone has home insurance with us, but not a mortgage,” says Corné.

“That would have been much more difficult for us to spot in the past, because we would have to pull data from various systems and compare it.”

Now, with a much more complete financial picture of each client, the firm can provide the comprehensive advice needed to help them make the best possible financial decisions.

“If you use Act! CRM in a disciplined manner, you can get incredibly valuable information from it,” says Corné.

“ The system really communicates with you in a way that’s very special. So, if you put something into the system, you get important information in return. Act! CRM really is amazing.”

Corné Ritsema

Executive, Bert Ritsema Verzekeringen & Hypotheken



Client tracking much easier

“We now record everything in minute detail, so we know what emails have been sent, who’s been contacted, what’s been discussed with customers on the phone, and what came of the consultation.”

That is already making it much easier for Corné and his team to track communications with customers. “Now I can upload all my emails into Act! CRM, assign tasks to each and then synchronise them with my calendar,” says Corné. “So I know, for example, if a customer has handed in a claim form by a certain date. If they haven’t, the system will give me a nudge.”

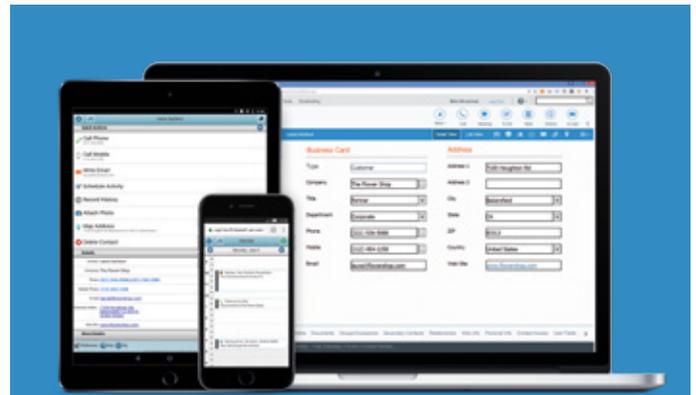
Trying to track such things previously would take up a lot of administrative time, which can now be spent on winning more business or providing consultancy to a client.

In fact, everything is much easier using Act! CRM.

“For instance, this morning,” says Corné, “I printed out all those customers who have car insurance with us, which I can now use to ask them about their other insurances, which aren’t handled by us. It took just two clicks.”

Has Act! CRM lived up to its expectations?

“I’d certainly recommend it as a CRM system to others without a second thought,” says Corné. “The system really communicates with you in a way that’s very special. So, if you put something into the system, you get important information in return. Act! CRM really is amazing.”



Results

- The company saw immediate benefits when it began using Act! CRM because it was able to deliver more efficient client service straightaway.
- Act! CRM provides a single platform with the flexibility to handle all the needs of the company’s different departments.
- Act! CRM eliminates the need for the separate systems previously used to record client data.
- The company is now creating more new sales opportunities thanks to the fresh insights into a client’s situation Act! CRM provides.

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