



# UnipolSai Assicurazioni S.p.A

*IBM Customer Experience Suite solution supports multichannel digital relationships with clients*

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## Overview

### The need

After Italian lawmakers passed the Insurance Deregulation Act in 2013, UnipolSai Assicurazioni S.p.A had the impetus it needed to move forward quickly on its strategic plan to engage clients through multichannel digital experiences.

### The solution

UnipolSai deployed a new customer portal and agent portal built on the IBM Customer Experience Suite solution to offer targeted online information based on user profiles.

### The benefit

UnipolSai expects to better support its clients with self-service options and grow the business by funneling to agents the insights gleaned from multichannel, multibrand sources.

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Headquartered in Bologna, Italy, UnipolSai Assicurazioni S.p.A handles the insurance operations of its parent company Unipol Gruppo Finanziario. UnipolSai is one of the largest insurers in the Italian marketplace with approximately 15,000 employees and a client base exceeding 10 million. In addition to its own network of close to 3,400 agencies, UnipolSai markets its products through joint ventures with a number of banks.

## Evolving to a web consumer-oriented company

In 2013, Italy passed the Insurance Deregulation Act (Decreto Sviluppo) mandating that insurance companies provide customers with direct access to their individual policy and personal information, including contracts, claims and payments. The new law provided the impetus UnipolSai needed to move forward quickly with its strategic plan to establish integrated multichannel digital relationships with its customers. The goal was to better serve UnipolSai agents and clients with a more complete understanding of customer and marketplace needs.

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*Enhancing agent-based customer relationships by integrating multichannel digital interaction was a cultural shift and technological challenge for UnipolSai. “Before, we supported one type of user, the agent, and now we’ve added our clients, the marketing staff and contact center employees,” says Franco Rigamonti, manager of innovation and software architecture at UnipolSai.*

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*“We are able to target content and applications based on the user agency, location and role, and other factors. And agents now have access from their tablets.”*

— Franco Rigamonti

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### Extending digital services

UnipolSai contracted with IBM Business Partner Gaia, IBM Advanced Business Partner Factor-y S.r.l. and IBM Premier Business Partner Blue Reply S.r.l. to help deploy new agent and customer portals. The projects were separate, running in parallel. “The only commonality was the infrastructure,” says Franco Rigamonti, manager of innovation and software architecture at UnipolSai. “We chose the IBM Customer Experience Suite as the foundation upon which to build the portals. It was the logical choice because it is based on the IBM® WebSphere® Portal platform that also underlies the CRM and enterprise content management systems we deployed to serve our agents.”

As part of the implementation, the project teams moved approximately 10,000 documents from the existing Microsoft SharePoint application to the Customer Experience Suite solution. Team members created procedures to map attributes between systems so that each document could be re-created automatically in the IBM Web Content Manager repository, a component of the new solution. UnipolSai uses the repository to store and manage master data documents for both the agent and customer portals.

### Creating targeted content dynamically

Before implementing the Customer Experience Suite technology, few people at UnipolSai were authorized to publish to the web. Now more staff members in marketing and other areas of the business are authoring content, using templates the Gaia communications agency team designed. Within months of deployment, the repository grew 20 percent to approximately 12,000 documents.

“The Web Content Manager software offers a well-articulated taxonomy and rich attributes for correlating content from multiple sources, helping us create personalized web content,” says Rigamonti. “People coming to portal sites see content that is dynamically filtered and assembled based on their profiles and interests.”

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## Solution Components

### Software

- IBM Customer Experience Suite V8.0
  - IBM Content Analytics with Enterprise Search
  - IBM® WebSphere® Application Server
  - IBM WebSphere Portal V8.0
  - IBM Web Content Manager V8.0
  - IBM Web Experience Factory V8.0
  - IBM Rational® Application Developer V8.5
  - IBM Rational Team Concert™

### IBM Business Partners

- Factor-y S.r.l.
- Blue Reply S.r.l.
- Gaia S.r.l.

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*“The more we learn about our clients, the better positioned we are to funnel opportunities to our agents.”*

— Franco Rigamonti

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## Enriching the agent experience

This ability to provide dynamic, targeted content is a primary benefit of the new agent portal. The previous portal solution, based on the SharePoint application, basically comprised a content library and search engine. It was up to each agent to find relevant information. With the IBM solution, agents view content specific to who they are and what they are doing. For example, when agents sign in and go to a product page, they see the full range of content they are authorized to see, including news, regulations, marketing campaigns, required reading and links to coursework. Once signed into the portal, agents also have access to authorized applications to help them manage their client relationships, including reports, claims, CRM, policy management and email.

## Gaining insight on client base

Building on the same platform used for the agent portal, the UnipolSai project teams designed and deployed a client portal in less than six months. In compliance with the new law, the site gives registered customers access to their policies, claims and payment deadlines. They can also see agency information for each policy.

Going forward, UnipolSai plans to expand self-service capabilities and add near-real time marketing and content analytics capabilities. The company wants to extend its master data with social data from multiple channels. The greater the insight into its client base, the better it can support its agents.

## For more information

To learn more about IBM Customer Experience Suite products, please contact your IBM marketing representative or IBM Business Partner, or visit the following website:

[ibm.com/software/info/customerexperience](http://ibm.com/software/info/customerexperience)

To further explore the innovative UnipolSai website, please visit:  
[www.unipolsai.com](http://www.unipolsai.com)



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