



## Netviewer Customer Success Story

# Insurance brokers rely on internet co-operation

### !!! The task at hand

Brokers at the Indatex Service for Finance and Insurance AG can conduct their business between brokers and insurance companies on a fully electronic basis. The type of work involved includes underwriting, portfolio changes, damage regulation, and the invoicing of broker's fees and commissions. The electronic workflow of this brokers' platform is replacing time-consuming and expensive paperwork.

### !!! The challenge

Customer satisfaction has top priority at Indatex. As a consequence, support when using Indatex software has to be quick and efficient. Support requests can range from software installation issues, activation of the Indatex platform, instructions for new users, and trouble shooting of technical problems. The platform is complex and occasional on-site support calls have been necessary. With the aim of making the best use of time and resources, Indatex recognised that support services had to be conducted with greater efficiency.

### !!! The solution

Financial advisers, brokers, independent agents and insurance companies using the brokering platform now receive any necessary technical assistance via one of the most modern forms of communication: Web collaboration with Netviewer software. This enables Indatex AG to offer their users the best possible support service, ad-hoc and via the internet. In emergencies, the customer and supporter are in direct contact both by phone and via the Netviewer connection. The customer-care employee has a direct view of the customer's PC screen, which offers a direct insight into the problem and which is not dependent on the customer's technical expertise. In approximately 70 to 80 percent of cases, problems arise during new registrations when the insurance broker needs assistance to set up the software. Support queries are generally solved very quickly when using Netviewer. After the positive experience gained, all eight Indatex support employees are now working with Netviewer.

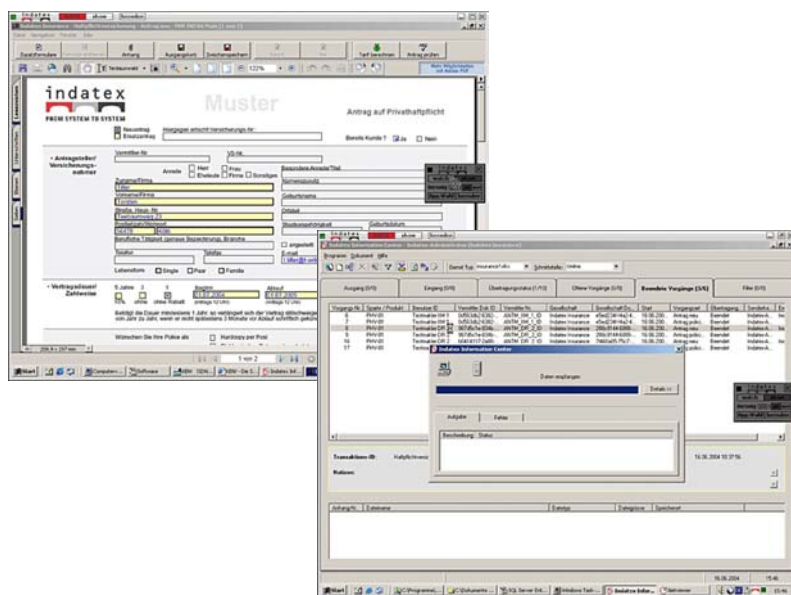


### !!! Easy operation solves problems quickly

Netviewer is very easy to operate. The Indatex supporter informs the customer by phone of an internet page to be accessed by browser. With a click of the mouse, the customer can start the Netviewer client program. The supporter then reads out a connection number, which the customer types in to establish the secure connection. This is the guarantee that the proper support workstation connects to the desired customer PC, even in the almost endless world of the internet. Once the connection is established, the Indatex employee can see the customer's screen content and can recognise operating mistakes or other problems very quickly. If necessary, the customer can pass over remote control rights to the supporter, enabling the Indatex employee to directly operate the customer's PC over the internet. A number of apparently serious problems have been solved quickly and easily thanks to Netviewer.



## Netviewer Customer Success Story: Indatex AG



**!!! Brokers use Netviewer for advising and sales**

In the meantime, the first insurance-broker offices have started using Netviewer for their own customer communications. After all, internet collaboration is suitable for more than just technical support; it is also a great tool for offering advice and sales. Customers with an internet connection receive a visual presentation of financial and insurance products; there's no need of a personal visit. The advisor can present the sober figures as expressive graphics directly on the customer's screen for even more persuasive argumentation.

### !!! At a glance

Developed in Karlsruhe, Germany, the Netviewer solution provides a range of advantages to the Indatex platform:

- ☒ Netviewer had already paid for itself after just a few support events. The improved remote maintenance (because both participants see the same screen content) makes on-site support simply unnecessary in most cases.
- ☒ The result - significant savings of expenditure and time.
- ☒ Customers value the fast and effective remote support - right from the start the system was received positively by everybody involved.
- ☒ Netviewer software does not have to be installed - neither at the consultant's end nor with the customer. Communications take place ad-hoc over the internet.
- ☒ The only licences required are those for the supporter workstations. The Netviewer client program is provided at no cost. This allows the consultants to conduct Netviewer sessions with any number of customers without incurring extra costs.
- ☒ Netviewer is based upon internet standards, and so it runs independently of the customer's system, whatever Windows version is running, and whatever the configuration.
- ☒ Highest security is assured by 128-bit encryption, an essential aspect in view of the sensitive data involved.