

The role of CRM

Video transcript

Jay Thacker:

Hello and welcome. My name is Jay Thacker, I'm the Accident and the health underwriting manager at Aviva. Today we are hosting a fireside chat with Megan and Melody and the topic of discussion will be the world of client relationship management.

So, Megan, can you tell us what the role of the client relationship management involves?

Megan Toogood:

In short, the role of a CRM at Aviva as part of our commercial proposition is to bring the best of Aviva to all of our clients. We essentially play the role in connecting the dots between Aviva, the client and the broker, making sure that we deliver on exactly that promise that we stated in the outset.

From delivering support at the initial quote stage all the way to the ongoing risk, claims and wider business support. We support clients in the UK mid market space, but also those large global corporate clients ranging in a turnover from £5 million annually to billions of pounds annually. Also touching sectors across the construction industry, telematics, leisure sector, you name it, we touch multiple different sectors.

But essentially our role is to be that pinnacle point to support our clients making sure we see insurance as moving from just a risk transfer proposition, but to risk partnership for all of our clients.

Jay Thacker:

So, Melody, can you tell us more about the CRM proposition, how it evolved and what were the origins of it?

Melody Lyndon-Stanford

The Aviva client relationship management proposition came about back in March 2010 with the founding of our global corporate specialty department. And in fact, at the time, we wanted to develop a proposition where our larger, more complex clients felt supported, had a central point of contact and could collaborate internally to bring together all of the best parts of Aviva.

And in fact, that is where we can demonstrate are some of our best value added services.

Jay Thacker:

So, Megan, now we have a better understanding of the role of CRM and how the proposition evolved, can you give us some colour in terms of the main principles?

Megan Toogood:

So the main principles that we stand for and work towards the CRMs at Aviva are firstly always delivering the best for our clients. Secondly, we also pride ourselves on delivering the best of Aviva to our clients.

At Aviva, we are more than just a general insurance business. There are multiple different areas to our businesses, so it's making sure that we take that one Aviva approach and look at our client as a whole business and seeing what added value we can give to them.

The third thing that we pride ourselves on is building those really strong, meaningful and long lasting relationships with our client. We want to understand what truly matters to our clients and going above and beyond just their normal service delivery.

An example of that is we host multiple client forum events yearly. So last year we hosted, I think, around seven events focusing on lots of different areas. One was on property investors looking at the planning for the future. We had another thought forum event on the future of mobility for our mid market clients. And we also had a fantastic event last year for our GCS clients on sustainability.

And with all that being said, the key principle that we all pride ourselves on is to make sure we deliver first class service to all of our clients.

Jay Thacker:

So, Melody, can you give us a better understanding of what, a normal day for a CRM looks like at Aviva?

Firstly, we're saying there is no typical day for a CRM. Every day is extremely different. And in fact, that's one of the reasons I love the job so much.

I don't know if you'd agree? (completely agree)

The biggest part of our role is really the collaboration piece. So pulling together all the different components of Aviva to deliver on a client's proposition so that could be working across claims, risk management underwriting and in fact, client teams could have anything up to 20 people working on them.

And we'll be bringing everyone together, making sure that everyone is aware of the client's priorities and the broker's priorities. And we are delivering on our promises.

And I don't know if there's anything extra that you'd add to that, Megan?

I think I'd agree with everything you said, and another fantastic thing about our role is it's not just being in the office in Fenchurch Street, every day. It's going out on site to see our clients and also to see our brokers. The other week, I was out visiting one of my client's, new sites on the north coast of England, but also going to their businesses and helping, whether that be at one of their employee days, educating them on risk and insurance. It's quite exciting.

So, Melody, how do we work with our broker partners?

Melody Lyndon-Stanford

So we work very closely with our broker partners, and that's really critical for us. It's a tripartite relationship, and we want to make sure that we are working as actively with our broking partners as we are with our clients. So in a way we're an extension of the broker's relationship with the client, and it's very much a tripartite relationship.

And what are we trying to do? We're just trying to make the broker's job as easy as possible.

That's wonderful, thank you both very much for your time today and for elaborating on the wonderful world of CRM