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Success Stories

Insurance

Alte Leipziger - Personal, but not at the same table

- What was required was not only the digitization of a few sub-steps, but of the entire consultation process: from online appointments and video chat to the conclusion of contracts with e-signature.
- Flexperto was chosen to handle this while guaranteeing data protection and easy integration into other systems.

100€

Saved per
consultation

402%

Increase in online
consultations since
2019

89%

Average customer
rating of online
consultations

"The goal was to create a technical possibility to conduct our counselling sessions online - in person, but not at a table!

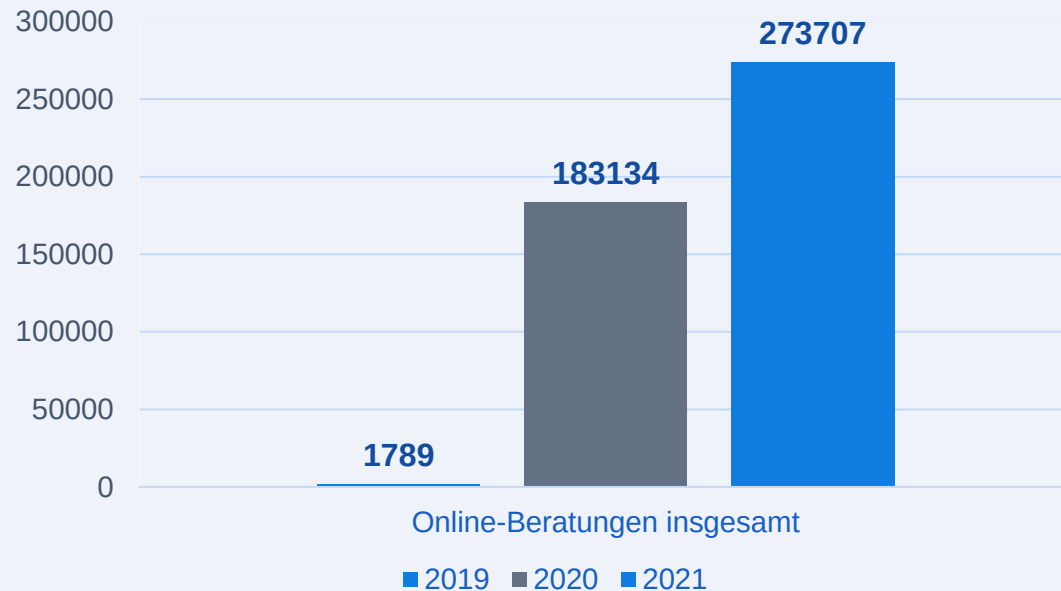


Dirk Hergesell
Sales Director

Broker

MLP relies on Flexperto throughout its sales organization

- Introduction of video counselling on 3,500 workstations
- Rollout to 2000 counsellors within 6 months
- Operation within highly complex Citrix IT environment
- Mifid 2 compliant recording with transfer to archive solution



"Thank you again for your efforts, combined with the introduction to Flexperto. I have never had so much great feedback on an 'EDP topic' from the team."



Alexander Hofmann

Head of Department Consultant Workplace

Financial Services

Dr. Klein offers clients online advice - and is setting itself up for the future

- Dr. Klein's clients and around 400 active advisors are convinced by the online advisory service.
- It took only 14 days from signing the contract to going live after previously using a competitor system.
- Thanks to an integration into their own CRM system, the solution can be used without data silos and media breaks.

[Watch Video: Dr. Klein x Flexperto Cooperation](#)

+ 50%

Higher Conversion
Rate

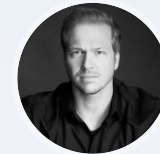
+ 3

More trades per
advisor and month

41minutes

Average Duration
per Online
Consultation

"Thanks to the integration capability, we have integrated the entire Flexperto functionality into our CRM in order to prevent silo solutions. In this way, we guarantee that, for example, transfers can also take place between advisors without any loss of information here."



Jan Hagge
Product Owner

Insurance

WhatsApp legalised - next level customer communication in sales and service

- Provision of a complete omni-channel advisory platform.
- Data protection-compliant operation of WhatsApp for Business API as the first insurer in Germany.
- Combination with all other channels.

[Watch Demo Video: WhatsApp Integration with DEVK Insurance](#)

"With Flexperto, we are taking another step in the direction of hybrid advisors: continuing to serve clients in the familiar analogue form, but supplementing it with digital communication channels that the client demands."



Mehmet Türker

Omini Channel Management Specialist

Banking

Sparda-Bank West - Accompaniment as a partner in the cooperative sector

- With the Digital Branch, Sparda West offers its customers the possibility of online counselling and thus combines the flexibility of the digital world with the individuality of a personal conversation.
- For Sparda West, 3 concrete areas of application for Flexperto and video consulting could be identified:
 - Construction financing
 - easyCredit
 - MeinInvest



Online-Beratung bei Ihrer Sparda-Bank West

Willkommen in Ihrer Filiale Digitale Beratung

Beratung – flexibel und bequem

Mit unserer neuen Online-Beratung

- sparen Sie Zeit und Wege.
- profitieren Sie von flexiblen Beratungszeiten
- beraten wir Sie mit Livebild am PC oder Tablet
- sehen Sie benötigte Dokumente live auf dem Bildschirm des Beraters
- können Unterlagen schnell und sicher empfangen werden



Wenn Sie nicht zur Filiale kommen möchten, kommen wir auch gerne digital zu Ihnen zu den Themen:

- Baufinanzierung
- Anschlussfinanzierung
- passende Geldanlage finden

So einfach geht's



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→ **Terminvereinbarung Baufinanzierung**

→ **Terminvereinbarung Geldanlage finden**



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Die **elektronische Vertragsunterschrift** ist einfach und schnell möglich und Sie erhalten sofort das Dokument elektronisch für Ihre eigene Ablage.

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