

Client Profile:

Securian Financial Network

TAKING CRM TO THE NEXT LEVEL BY
MIGRATING TO THE WEB



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Mary Anne Smith
Director of Individual
Business Technology
Securian Financial Network

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The challenge

Having used E-Z Data's Windows®-based Client Data System® (CDS®) for more than five years, the management team at Securian Financial Network (the distribution arm of Minnesota Life) was already familiar with what made E-Z Data's solutions among the most trusted in the industry. "We chose E-Z Data because of the company's experience in the financial services sector," says Mary Anne Smith, Director of Individual Business Technology at Securian Financial Network. "E-Z Data had industry market share, industry experience, and its existing users had a history of good experiences with the product." And while CDS had proven to be useful for its advisors, the company found that the solution was more suited to the individual advisor than as a tool for managing at the agency level.

To address the void in functionality, Securian began looking for a web-based agency management tool that could deliver the valuable benefits of a centralized customer relationship management (CRM) solution to their field. Among the goals for the project were providing all users with access to data from anywhere, any time of the day or night, and to reduce the need for IT personnel at each firm so they could focus their time and resources on their customers. "At that time, everyone understood and believed in the value that a web solution could bring to the company," says Smith. "It was just a matter of finding the best solution for our business."

Although the new initiative was focused on a web-based solution, the selection criteria proved to be nearly identical to the selection criteria for the Windows solution: Securian wanted a vendor that knew their business and had experience providing this type of solution to financial services organizations.





The solution

The winner, once again, was E-Z Data. This time around, however, the company chose the web-based SmartOffice® for

it possible to streamline agency processes and roll out well-developed marketing campaigns across the organization, in addition to providing each firm with the capability to build their own unique campaigns. SmartOffice also helps the company proliferate best practices by standardizing how information is entered, how data is stored, and even how the system is queried. Securian can also do queries to help the firms identify opportunities they may otherwise overlook.

Agency Management — a solution that not only provided the browser-based functionality they needed, but also included new functionality designed expressly to help manage processes at the firm level. According to Smith, “We knew what E-Z Data had to offer as a company. We believed they would continue to be a good business partner, and we felt we could get SmartOffice up and running faster due to the richness of its out-of-the-box functionality.”

Using SmartOffice, Securian has created a standardized platform for all of its firms. The centralized platform makes

Securian has recently seen a significant jump in fee-based financial planning, and SmartOffice helps support this change by making it easy to track customer information at the household level. When an advisor sells a fee-based plan, they can track the plan and the opportunity in SmartOffice. Once the information is in the system, management can clearly identify successes, as well as identify where process improvements can be made.

The results

Securian began rolling out the solution using a pilot user group of four to six of their most committed general agents — who were also their toughest customers. Working closely with this GA advisory group, the goal of the team was to iron out any issues and drive a good success story early on in this process.

As with any major implementation, challenges are to be expected. To manage this, the group holds regular teleconferences to review and resolve any data, training, or system issues. The team is currently investing a lot of time into carefully populating data to ensure data integrity going forward, and they are already updating investment data on a daily basis.

With its initial success under way, Securian has set a target of having 25 of its firms live on SmartOffice by year-end, and the remaining firms live by mid-2005.

Smith adds that the support provided by E-Z Data was extremely beneficial to the success of the project. “The

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THE SMARTOFFICE SOLUTION IS HELPING SECURIAN FINANCIAL NETWORK TO:

- > *Standardize and streamline firm management processes*
- > *Cross-sell and up-sell products within its existing customer base*
- > *Provide its firms with the technology infrastructure they need, allowing them to focus in driving revenue*
- > *Adhere to the corporate technology standard of J2EE*

About Securian Financial Network

Securian Financial Network is the distribution arm for Minnesota Life Insurance Company, whose insurance, pension, and investment products provide financial security to millions of individuals and businesses nationwide. Founded in 1880, its record of financial strength and stability positions it as one of the most highly rated financial institutions in America. From its St. Paul, Minnesota, national headquarters and sales offices and independent firms around the nation, 4,400 Minnesota Life associates provide clients with quality service and product expertise.

About E-Z Data, Inc.

E-Z Data, Inc., established in 1986, is the leading provider of front-office systems for insurance companies, broker-dealers, general agents, agents and investment advisors. Its web-based SmartOffice® solutions and Windows®-based Client Data System® solution help synchronize the efforts of all the key players in sales, marketing, and customer service.

E-Z Data serves more than 40 of the largest U.S. and international insurance and financial services companies, including HSBC, MetLife, National Financial Partners, Prudential, and Securian. The company's domain expertise, coupled with mature, industry-specific business solutions, results in consistently successful customer implementations.

For more information about E-Z Data's solutions, visit www.ezdata.com or call 800-777-9188.

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