



Factsheet Swiss Mobiliar

aclevion.

The path to an integrated marketing portal

Swiss Mobiliar

Swiss Mobiliar is the oldest private insurance company in Switzerland and an established cooperative. Its economic performance is especially customer focused. Rather than distributing dividends to shareholders, customers receive annual, voluntary policyholder bonuses. Like this, several million Swiss francs regularly flow back to the insured through premium reductions.

In addition, Swiss Mobiliar also supports preventative projects within communities and climate research, promotes art projects and is an active sponsor of sports. With a premium volume of over four billion Swiss francs, Swiss Mobiliar is one of the leading insurance companies in Switzerland. Swiss Mobiliar occupies a leading position in the Swiss market. Every third household as well as more than every third company, is insured with Swiss Mobiliar.

Comprehensive marketing thanks to a flexibly expandable system solution

In order to manage its large and diverse amount of marketing content, Swiss Mobiliar aims to be well equipped in system technologies, and has, along with

other systems, been relying on censhare's Omnichannel Content Management, since 2009. Swiss Mobiliar started with digital asset management, Web2Print and the print editorial system from censhare. It used this solution for the management, refinement and coordination of images, graphics, logos, icons, content and layout data. The digital and collaborative integration of various internal and external contractors (such as advertising agencies, photographers, etc.) has also been supported by censhare since the beginning of the cooperation. As a result of its success, Swiss Mobiliar consistently extended the censhare system solution to other areas of application and integrated it in various business processes. This was followed in 2016 by the expansion to include the Swiss Mobiliar brand portal.

Initially, the Swiss Mobiliar brand portal included information, guidelines and various downloads. Due to the large demand and use, a self-service area was designed and added. This allows users to enter simple advertising materials via an online form assistant and download them as printable PDFs. Thanks to the templates, thousands of advertising materials have been generated locally by Swiss Mobiliar agency staff, over the past few years. Thanks to the additional self-service area, the Swiss Mobiliar brand portal has been a great success internally.

This led Swiss Mobiliar, in 2019, to decide to expand the existing brand portal into an even more comprehensive and holistic marketing portal.

« With aclevion, we have a very reliable partner who meets our quality requirements and is prepared to go the extra mile. It gives us enormous pleasure to be able to work with the aclevion staff. »

Nadia Gerber, Product Owner Marketing Portal

One marketing portal for all

As the first point of contact, today's Swiss Mobiliar marketing portal offers all users, needs-based content and a set of measures. With the following objectives in mind, Swiss Mobiliar set out on its journey from brand portal to an integrated marketing portal, with the following objectives:

- The portal is to be the digital First Point of Contact (FPOC) for all marketing topics in the future.
- Marketing use cases including best practices are provided for the quick and easy creation of target group-oriented measures
- Contact persons and specialists are listed in the system for each topic area, who can support and guide users in the creation of marketing measures
- Dynamic structuring of content according to target group-specific topics
- Cross-links to relevant topics
- Search and filter functions for quick research, even for inexperienced users
- Expansion of the self-service portal to include further functions for the creation of complex advertising material (see the following example «cinema event»)

The «Marketing Portal» project was realised in cooperation with several implementation partners in order to meet the needs of the complexity of the project.

Dynamic marketing thanks to the appropriate system architecture

As an implementation partner, aclevion implemented the Swiss Mobiliar marketing portal based on the censhare online channel. This meant that classic functions such as bookmarks, searches or the role-and-rights concept, could be integrated directly into the Swiss Mobiliar solution and customised to suit the specific needs of the customer.

The censhare WebClient was configured by the aclevion team, specifically to the needs of the Swiss Mobiliar application. With the censhare WebClient, all communication content is captured and managed by the Swiss Mobiliar webmaster. In addition, the marketing portal solution's content data is categorised according to topics and categories and has a dynamic content structure.

The Swiss Mobiliar marketing portal is also multilingual and offers content in German, French as well as partly in Italian, depending on the assigned user role rights. The user role rights for the marketing portal use are controlled via SSO (Single Sign On) via Swiss Mobiliar's Active Directory. This ensures that only authorised users can use the marketing portal at any time.

Self-Service Area

In the self-service area, Swiss Mobiliar's employees can become active themselves and independently create their own advertising materials using entry forms. Print templates with dynamic InDesign layouts are used, which are created based on the corporate design guidelines of Swiss Mobiliar.

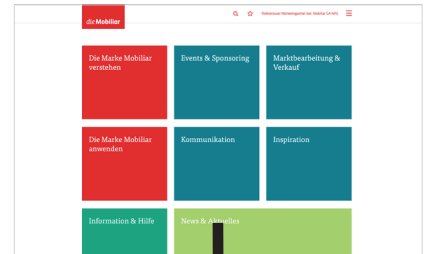
Swiss Mobiliar places the data defined in the entry forms, e.g., the general agent's contact information or address, directly into the layout. The content modules are structured so intelligently that even the gender-specific texts are adapted accordingly.

For example, if a Swiss Mobiliar employee creates advertising material with personalised elements, his or her personal data, as well as the appropriate agency address and/or images, they are then automatically filled into the placeholders provided. This way, professional and complex print documents can be created very quickly – and in three languages. A large part of the advertising material is produced fully automatically, and a printable PDF is sent as the final result. However, the system also allows orders to be processed with individual adjustments, which are finalised by desktop publishers or graphic designers.

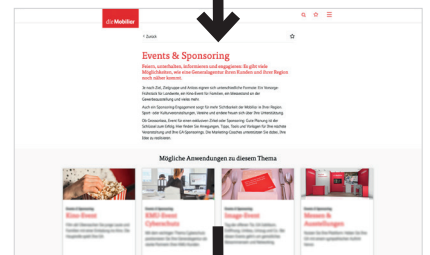
Use case example: cinema event

In the marketing portal, the employees of a general agency can find all the necessary information for organising a cinema event, for example.

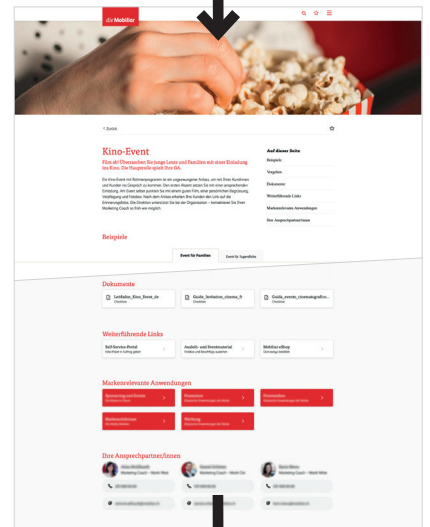
Topic overview



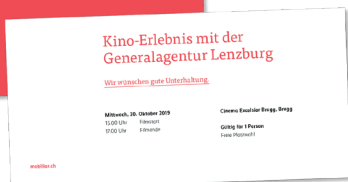
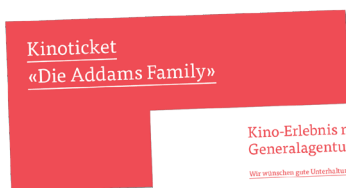
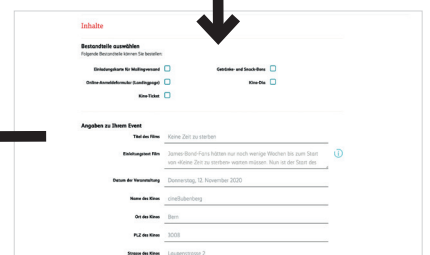
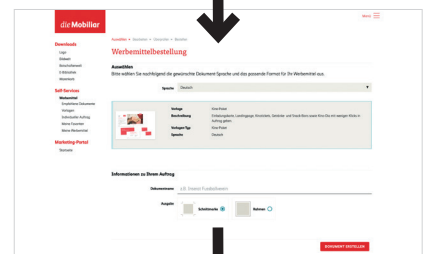
Topic with use case examples



Use case: cinema event with further information and downloads

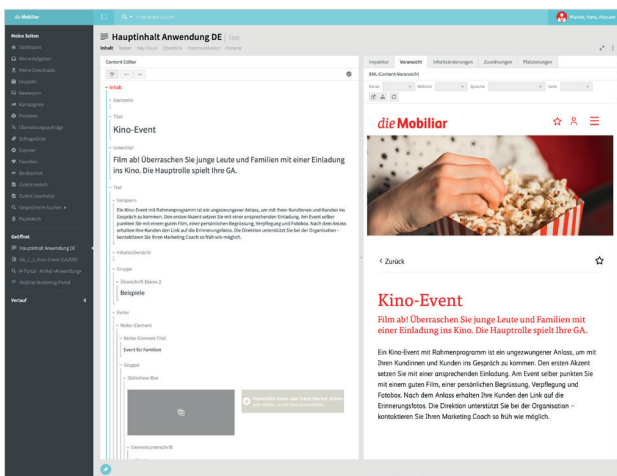


Order Advertising material



Embedding the marketing portal into the workforce

Even before the marketing portal went live, the employees were informed comprehensively and on several occasions about the new tool. This procedure facilitated the introduction and therefore a high level of acceptance was achieved from the start. In addition, user trainings for the webmasters and specific training documents were provided. Nothing stood in the way of a successful rollout.



Article entry in censhare WebClient

About aclevion

We see ourselves as experts when it comes to implementing and supporting clevo software system solutions, for optimal communication content management and its multi-channel use, in your company. The aclevion team has many years of comprehensive experience in consulting and supporting well-known national and international companies from a wide range of industries.

These include, for example, Alnatura, BLS, Chocolat Halba, Geberit, Globus, ESA, Leister Technologie, Manor, Migros, Office World, Sanitas Insurance, SwissRe, Swiss Post and many more.

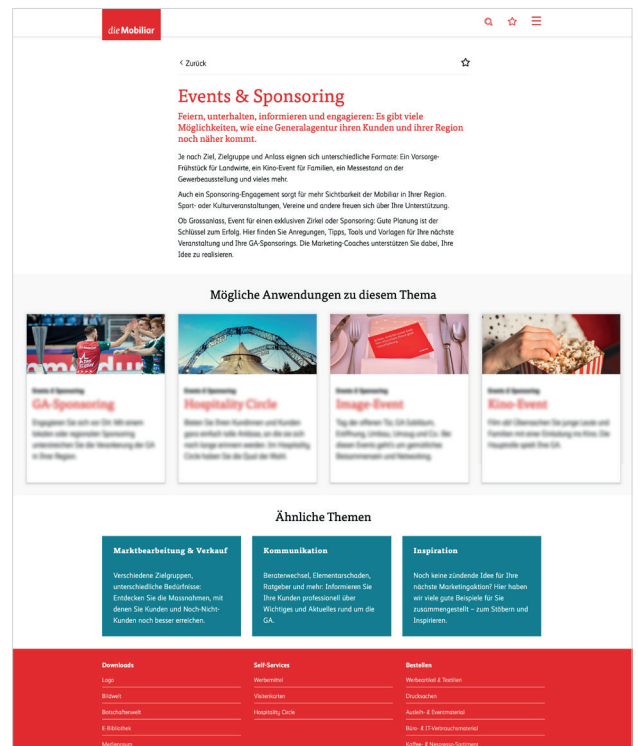
Further information at [aclevion.com](https://www.aclevion.com)

Summary

In summary, it can be said that with the new marketing portal, Swiss Mobiliar now has an integrated, even more flexible and efficient brand management tool. This is because the portal offers basic information on the brand and user guidelines for the brand elements as well as process-oriented application pages. With this combination, employees and service providers are equally empowered to act and communicate in the spirit of the brand, both visually and in terms of content.

Reto Kneubühl, Processes & Systems Manager, Marketing Services, Swiss Mobiliar:

«The feedback on the marketing portal as well as on the extended functions in the self-service area is consistently positive. Many applaud the greater dynamic of the layouts, as now even more print materials can be created directly, easily and highly efficiently by the various interest groups themselves.»



Topic page of marketing portal

Copyright © 2022 aclevion

All rights reserved. aclevion and other related trademarks are trademarks of aclevion AG. Other trademarks may be trademarks of their respective owners. This factsheet is for information purposes only. The contents of this factsheet were correct at the time of publication. aclevion makes no guarantee of any kind, explicitly or implied, with respect to this factsheet.