

Insurance: **Reale Mutua****Reale Mutua Assicurazioni**

Reale Mutua Assicurazioni, headquartered in Turin, is Italy's biggest insurance mutual. It has grown since its founding in 1828 to a network of four hundred independent insurance agencies that sell Reale Mutua products exclusively in three business lines: life, automotive and financial risk.

www.realemutua.it

"Luna is customized to Reale Mutua specifications to give us the enterprise-level analytic reporting and assembly/consolidation modules, formatting, and graphics we need to prepare and publish the budget" **Adriano Motta - Sales Planning Director Reale Mutua Assicurazioni**

Luna, a powerful new planning capability to monitor the performance of the sales channels

The Goal

One challenge was putting together the annual sales budget, which includes individual goals and marketing funds allocations for all 400 agents, each of which has unique sales opportunities and promotional needs. Advertising and promotion varied greatly among agents, giving the company a consistent market presence.

The Key initiatives

- Provide agents with better company support and a quick implementation
- Strengthen company market position
- Remain competitive

The business targets

- Give agents tools to identify ways to increase sales within their existing customer portfolios
- Provide easy access to current sales-against-budget numbers
- Offer special analytics to identify sales opportunities
- What-If? questions using graphical displays
- Release the annual sales plan and budget in a timely, cost-effective manner

The business drivers

- Launch a new business planning process built around Luna software
- Abandon spreadsheet bottlenecks
- Create a new budget and sales process from the ground up

“Luna Business intelligence software is the heart of the technology we use for the new process”.
Adriano Motta - Sales Planning Director – Reale Mutua Assicurazioni

The modules Implemented

Allocation and sharing with Managers

Allocation and sharing with Area Managers and District Managers; Presentation of the plan and implementation of observations

Allocation and sharing with the District Manager relative to each agency

Identification of the objectives to be transmitted to a single agency during meetings of collective team of specialists at the District level

Sharing objectives and plans with agents

Obtaining commitment on the part of agents, synergistic with respect to common goals and results

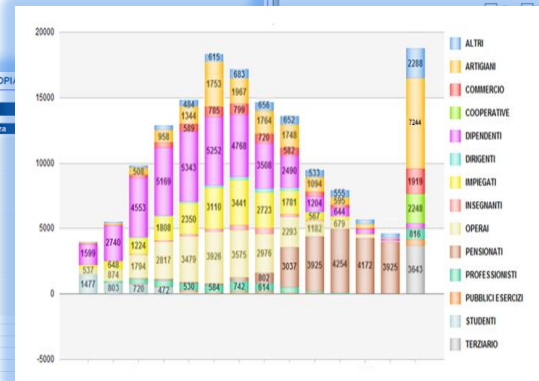
Consolidated objectives and business plan

Aggregation and verification level-by-level, with recycle where necessary for calibration and conformation to the budget of the Group



The Customer Experience

“The company now begins the annual sales budget process with a board-approved fiscal year plan and works out its application at the agency level through a tiered bargaining process.”



The Return

Adriano Motta is now setting revenue goals for Reale Mutua agents with little effort from the company's 12 Regional Managers or from the agents themselves. Thanks to the new process and the implementation of Luna.

