

# Case Study: How a leading payer went from product-focused to member-centric – and the lessons for pharma

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Build  
for  
Change®

**DAK**  
Gesundheit  
*Ein Leben lang.*



## About the speakers



### René Schlagentweith

Head of Planning and Governance  
at LOB Market

- Responsible for the Pega project portfolio at DAK
- 20+ years of experience in internal consulting and project-management
- 4 years of experience with Pega technology



### Christoph Schiessl

Management Consultant &  
Managing Director

- Helping companies to adopt data-driven customer management
- Lead Decisioning Architect at DAK
- 10+ years of consulting experience in healthcare and insurance industry
- 5+ years of experience with Pega technology



A leading Pega Partner  
for Pega Marketing and  
Decisioning

# DAK-Gesundheit – Our facts and figures

- One of the leading German health insurance companies
- Award-winning **quality and service**
- More than **5,8 million insured**
- Available Germany-wide at over 319 **service centres**
- Competent and dedicated employees
- Annual **service volume of over 20 billion euros**



# The need to adapt

## Market situation

- Competitive situation
- Continuous improvement

## Customer needs

- Digital services
- Personalized experience

## Efficiency

- Customer service
- Cost reduction

Strategy

## Strategic priorities (by 2023)

- Customer centricity
- (Digital) Innovation capabilities
- Result-driven organization
- Collaboration
- Cost-efficiency

Action



Pega Infinity™

Adopt Pega as customer engagement platform

## Why active retention is important for DAK

- DAK's customers requested more information about services and benefits
- Research revealed that the regular pro-active customer contact with relevant offers reduces churn
- DAK usually has less or no touch points with healthy customers

## How retention was done (the old way)

- Selections of target customers once a year
- Splitting and distribution of the lists
- De-centralized campaigning and status tracking

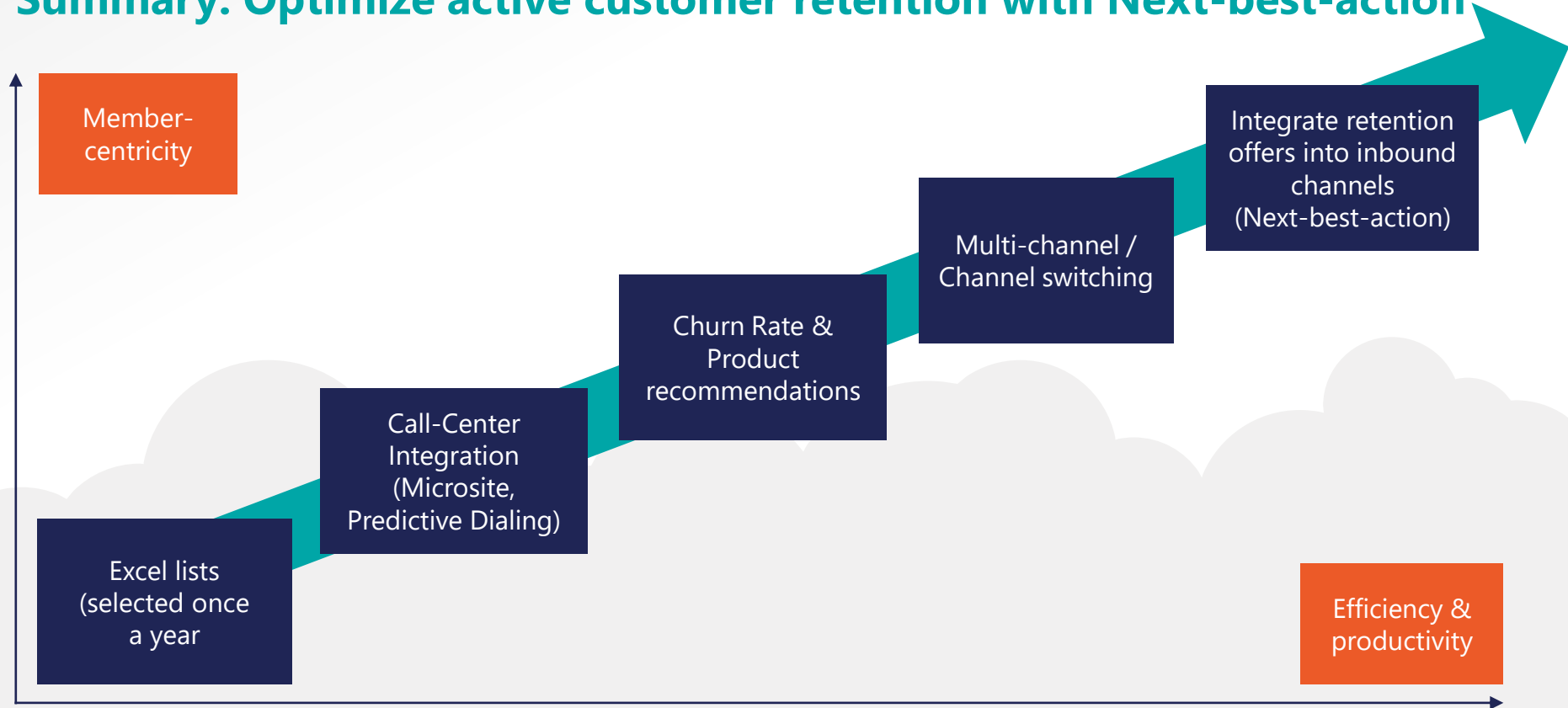
### Drawbacks:

- Outdated data
- Limited control
- No governance

# Customer retention

Never give your competitors  
a chance to steal your customers.

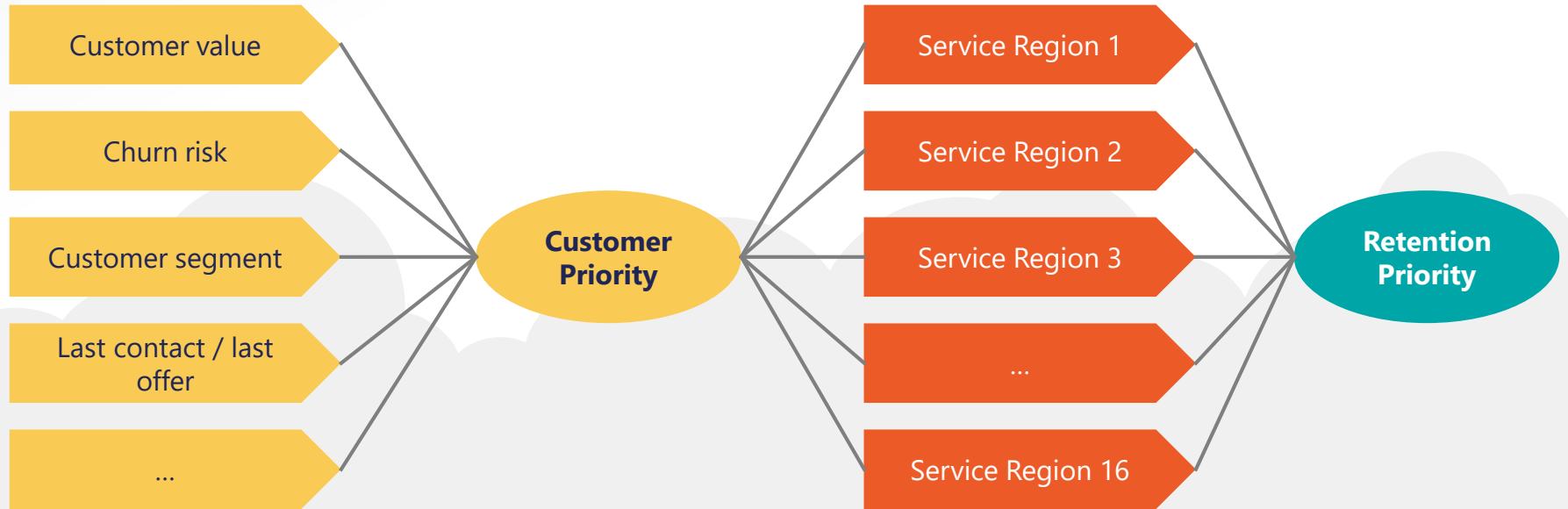
# Summary: Optimize active customer retention with Next-best-action



# Prioritization framework to select the Next-best-customer

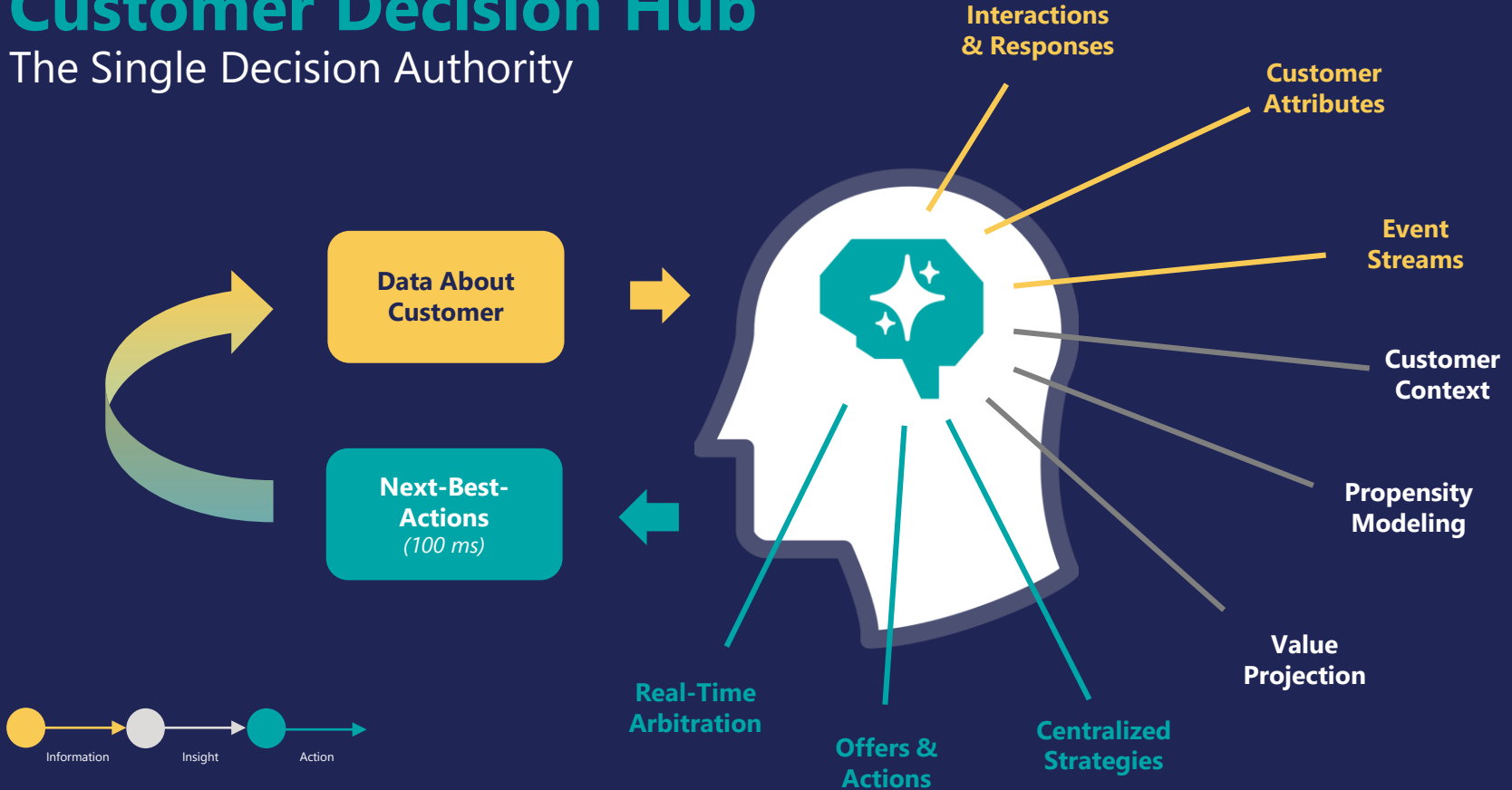
## Central contact strategy

## Regional adjustments



# Customer Decision Hub

The Single Decision Authority





## Results



**65% more retention offers** made to customers  
(with same use of resources)



Daily re-calculation of campaigns leads to **more relevant offers**



Prioritization framework allows **fast adaptability** for contact strategy changes



**GDPR compliance** ensured by reusable contact strategies



Additional **efficiency increases** in outbound campaigning with call center technology



More **transparency and control** in retention campaigns

## Lessons learned



Collect data “right” and build a solid **data foundation**



Adopt an **agile approach** with clear responsibilities and focused business goals



Use a **step-by-step transition** strategy to one-to-one marketing (not a big bang)

