



MANDATUM LIFE

# Mandatum Life Client Story

October 2019



MANDATUM LIFE

**ORTEC**  
FINANCE

## **Mandatum Life has been an esteemed client of Ortec Finance since 2018.**

Mandatum Life is one of Finland's most respected and solvent financial services providers. They offer private, corporate and institutional customers comprehensive services for building wealth and preparing for the future. Their services include unit-linked insurance and wealth management, personal insurance, pension and reward solutions for companies, as well as related consultation services.

### **Challenges faced by Mandatum Life**

The company was eager to improve its customer experience through more efficient customer life cycle management. They believed that knowing client's goals better would not only help them provide more meaningful solutions to clients, but would also help Mandatum Life stand out from its competitors.


While Mandatum Life wanted to offer better customer experience, they also wanted to find an efficient solution to fulfill the present and future regulatory requirements.

## How Ortec Finance helped Mandatum Life

Mandatum Life implemented OPAL, the goal based planning software from Ortec Finance, into their sales and client care processes in wealth management as a part of their goal-based service model. OPAL also became an important part of the digital wealth service ML Money mobile app.

From the beginning, Mandatum Life set clear goals for the OPAL users (wealth managers). Activities and results have been monitored on a monthly basis to make sure all their wealth managers have evolved as users of OPAL. Coaching sessions were an important part of the implementation process as some of the wealth managers found it difficult to use the system at the beginning. However, the overall user experience was positive and Mandatum Life received better client feedback in client meetings where OPAL was used.

During regular meetings with Ortec Finance, Mandatum Life provided feedback on developments and discussed their needs regarding future improvements.



***“Use of OPAL has helped wealth managers to create a more holistic and concrete picture of our client’s current situation and future goals”***

*Petri Väisänen, Head of Sales, Private Wealth Management*

## Results

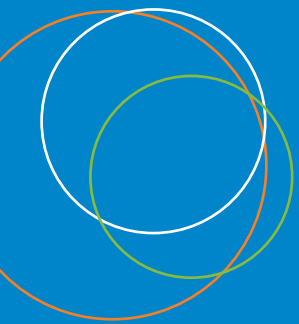
Using OPAL has helped wealth managers create a more holistic and concrete picture of client’s current situation and future goals. Furthermore monitoring the achievement of the client’s goals has also become an integral part of their client service model. Even though Mandatum Life is still in the learning path to become more efficient users of OPAL, they believe it has already supported Mandatum Life’s ambitious goals to serve its clients in the best possible way.





## Petri Väisänen

Petri is Head of Sales of Mandatum Life private wealth management and as well responsible for wealth management concepts. Mandatum Life is one of Finland's most respected and solvent financial services providers and part of the successful Sampo Group. Mandatum Life has an estimated 250,000 private and 25,000 corporate customers. Company's balance sheet exceeds EUR 11 billion. Petri is an experienced and client-oriented wealth management professional with over 15 years of experience.



## What is OPAL?

OPAL is a leading software solution for financial institutions globally, providing goal-based financial planning models that enable people to manage the complexity of investment decision making.

***Sophisticated solution, advanced calculations, simple communications & better client engagement!***



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