



Microsoft CRM Implementation for Specialty Insurer

One of the oldest insurance companies in the United Kingdom

The insurance company with an outdated CRM faced challenges in the general Insurance business. ITC Infotech was responsible for building a Next-Gen general Insurance CRM Platform for improved tracking of BDM/RSM, broker performance & integrated customer servicing.

Centralized
CRM system

Quicker
conversion

ITC Infotech is a leading global technology services and solutions provider, led by Business and Technology Consulting. ITC Infotech provides business-friendly solutions to help clients succeed and be future-ready, by seamlessly bringing together digital expertise, strong industry specific alliances and deep domain expertise. The company provides technology solutions and services to enterprises across industries through a combination of traditional and newer business models, as a long-term sustainable partner.



www.itcinfotech.com

CHALLENGE

- Using an outdated version of CRM which served the general insurance business but did not cater to the Investment and Schemes wings
- Lack of a centralized system capable of effectively tracking customer and policy lifecycle from Campaigns, Quotes, Policy Issuance, Renewals, Cancellations/Lapses, Praise/Complaints, and several others.

SOLUTION

- In-depth Fit Gap assessment was conducted considering the current CRM Version
- Took a stalk of their complex customizations and provided better out-of-the-box solutions, which enabled them to upgrade to newer versions easily
- Optimized policy and claims processes by solutions effective integration with Policy Administration Systems

RESULTS

- A centralized CRM system with tracking of all communication with clients empowers the sales teams with greater insight & better understanding of customer's needs and pain areas
- Greater visibility of opportunities being tracked across the organization dramatically reduces overlap/cannibalization of existing customers by different sales teams
- Quicker conversion through improved focus on targeted clients