



CASE STUDY- INSURANCE PROVIDER MANAGEMENT



About the Client

Our client is a global provider of risk management products and services headquartered in NYC. Their businesses provide a diverse set of specialty and niche-market insurance products in the property, casualty, extended device protection, and pre-need insurance sectors. The company's three operating segments are Global Housing, Global Lifestyle, and Global Pre-Need (funeral & memorial planning insurance).

Project Sales Automation

- Provide a unified platform for dynamic streamlining of workflow processes across business functions as it related to the sales process.
- Assist executive leaders and account executives in their initiative to increase profits, decrease costs, deliver scalable and leverage-able products, and expand lead opportunities.
- Help leaders manage teams, analyze business opportunities, identify opportunities for product training, and create successful marketing strategies.
- Enable leaders and account executives to build stronger, reliable support systems for their clients.
- Create a robust and cost-effective solution for the organization.
- Reduce manual effort around the compilation of data for generating reports and dashboards.

Key Challenges and Project Constraints

Client has previously implemented Salesforce (SFDC) as the CRM tool. However, the usage of the system across various business units is very minimal and has a high maintenance cost. This project will help senior management determine to continue with SFDC implementation to derive the desired benefits, investigate an alternative solution, or opt not to implement a new solution.

To overcome the existing business challenge, there was a need to understand and document business processes, and support technology along different business units to provide a unified system for the management of customer onboarding, sales tracking, marketing strategies, product development, reporting, and training activities.

Project Description

The primary goal of the project was to provide a one point solution for managing client relationships and lead generation. By simplifying the client provisioning process and providing a central point of management, the solution will enable the organization to provide enhanced client management, and streamlined inventory management (collection of documents, artifacts, reports, etc. as applicable). and business intelligence within a unified information technology environment

1. Implementation of the fundamentals.
2. Governance of fundamentals.
3. Simplicity of usage and avoid duplication of work.
4. Leveraging the out of box features provided by the Dynamics 365.
5. Integration of Dynamics 365 for Outlook.

Results

- Client was able increase their relationship cycle with customers by 30%.
- Gave a complete 360 Degree view of all their B2B opportunities.
- Online Integration with SharePoint helped the Client move away from using a shared drive location.
- Removed dependency on VPN and intranet network, and gave flexibility for the sales team to access the system on the go.
- Lower cost of Dynamics licensing also helped the client to make substantial project savings.

Let's Talk

Charter Global drives innovation in IT projects and business operations by defining strategy and providing consulting, digital solutions, custom development, and skilled resources. With an established customer base of Fortune 1000 industry leaders and over 100 successful project implementations, our experience and proven methodologies enable our professionals to deliver industry leading solutions in cloud technologies, open source, DevOps, mobility, CRM, ecommerce, SAP, and Oracle JD Edwards platforms.

- Founded in 1994
- Headquarters in Atlanta, GA, and 3 development centers
- Gold Microsoft Partner for the past 3 years
- Established customer base of Fortune1000 industry leaders
- 500+ full-time IT professionals support client projects

Contact

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