

# CRM enables Insurance sales effectiveness

## Customer Background

Crimson Systems' client acts as an authorised underwriting agent of Global Insurance provider, supplying a range of Construction Defects insurance policy products.

The product, purchased by the construction company on behalf of the premises occupant, insures the occupant against defects in the build quality. Our client audits the construction, on behalf of the underwriting insurance company throughout its build, ensuring it meets stringent criteria. As a result, there is a lengthy period from Policy sale through to inception.

## Business Challenges

Departments (Sales, Administration, Underwriting and Structural Auditors) operate disparate systems for Sales, Underwriting and Structural Audit, with consequent triplication of customer name and address information, re-keying of relevant data between those systems and inaccurate business intelligence.

Their existing Sales system, a Salesforce.com CRM implementation, was a tactical deployment by the business, resulting in inconsistent usage and adoption by the different teams and it not being supported by the in-house IT department. Customisations, intending to track the progress of Policy sales opportunities and their fulfilment throughout the construction build stages, failed to deliver the intended benefits.

UK Financial Services Authority regulations are driving up standards in quality management systems and traceability of the service supplied to customers. The need to monitor the progress of each Policy sale made from acceptance through to inception made the status quo untenable.

## Overview

### Industry

Insurance

### Solution Summary

Our client required changes in their Opportunity management processes and capability, for both sales effectiveness and regulation compliance improvements.

### Technologies

Microsoft Dynamics CRM 4.0  
Lotus Notes / Domino Server  
Microsoft SQL Server Reporting Services

### Key Benefits

Integration between Microsoft Dynamics CRM and the in-house Underwriting system has lowered administrative overhead and increased data accuracy by removing the re-keying.

The flexibility of the Microsoft environment will allow the IT department to rapidly and inexpensively deploy customisations and other integrations.

With the powerful workflow engine, our client was able to monitor the progress throughout the sales and fulfilment cycles, improving adherence to UK FSA regulations.



## The Solution

Parent company IT managers sought to improve the situation at our client and prove that Microsoft Dynamics CRM 4.0 could be deployed widely across the Group.

Customer, Broker and Construction third party account and contact data is now maintained in Microsoft Dynamics CRM and downstream systems are populated with any that are added or changed.

Crimson Systems acted as lead integrator of Microsoft Dynamics CRM to the in-house Underwriting system which acts as the Policy rating engine. The integration removes any re-keying of customer and opportunity information between the systems and allows the changeable quotations and other important opportunity information to be viewed from a single application – Microsoft Dynamics CRM.

“The most customisation is around the Opportunity entity. It has been configured to match the specifics of the insurance product and our client’s workflow tracking needs” commented Rob Dawson, Crimson Systems’ Lead Consultant on the engagement. “Once the Opportunity is won and the Policy sold, our client audits the construction using a custom entity in [Microsoft Dynamics] CRM. All throughout, they can now track appointments, E-mail, phonecalls and any letter correspondence with their customers or their representatives. It gives them the traceability they have been missing throughout the sales and fulfilment lifecycle”.

By integrating with the client’s Lotus Notes/Domino hosted mail services, Crimson Systems enabled inbound and outbound E-mail from within the Microsoft Dynamics CRM web client; offering full traceability of customer communications and complementing the intended move to team queue based working. Calendar appointment synchronisation with Microsoft Dynamics CRM, taken for granted in Microsoft Exchange environments, was achieved through use of a third party desktop plug-in to Lotus Notes.

Managers improved their service delivery by automating complex workflows in Microsoft Dynamics CRM. By configuring the application to become a workflow engine, action item creation to prompt next stage action or reporting of actions in jeopardy became a reality. “At a glance, their Administration team can now see those customers who need the most immediate attention. This will undoubtedly improve the service they are supplying” Dawson added.

Following proactive consultancy supplied by Crimson Systems, IT managers selected the Microsoft Dynamics CRM product because of its capability to integrate with other on-premise systems, the multi-tenancy feature allowing differentiated deployment to other disparate business units at the Group and because of its favourable total-cost-of-ownership when compared to Salesforce.com.

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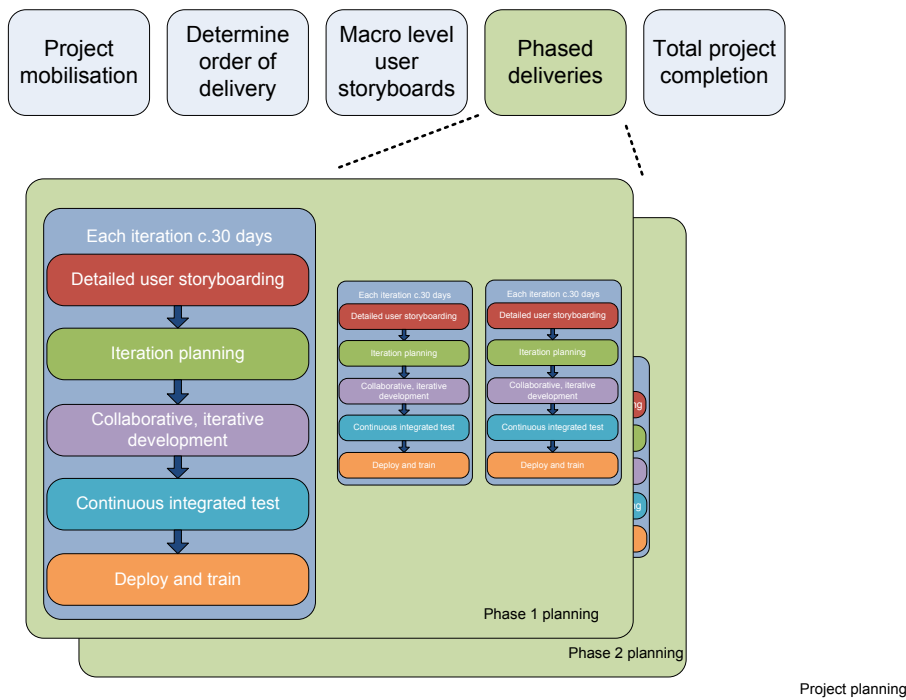
**Rob Dawson**  
Crimson Systems’ Lead  
Consultant



## Crimson Systems' Delivery approach

Crimson practices Agile Delivery methods. They are a set of development processes intended to create software in a lighter, faster, more people-centric way and are centred on the core principles of:

- > Individuals and interactions over processes and tools
- > Working software over comprehensive documentation
- > Customer collaboration over contract negotiation
- > Responding to change over following a plan



At the outset and throughout the project, Crimson coached its client on working with Agile Delivery methods – including how to work with user storyboarding, the roles of the customer and the supplier during the planning of each short development iteration and the level of collaborative involvement during the development.

As system integrator, Crimson Systems ran and governed the project including the management of issues and risks, rooted in PRINCE2 best practice, although tailored to join with Agile Delivery approaches.

Close collaboration during each delivery iteration allowed frequent demonstrations of, and where necessary rapid changes to, Microsoft Dynamics CRM functionality and customisations.

Throughout the software build, the platform was fully tested by Crimson Systems with other integrated components of the architecture to ensure problems were found early and not just before the software went live.



### Benefits realised

Ultimately, the solution supports the client's strategy of holding a single customer system with oversight of potential sales and ongoing constructions that mature into Policies.

- > Lower administrative overhead and increased data accuracy by removing the re-keying between the customer and underwriting systems.
- > With the powerful workflow engine, the client is now able to monitor the progress throughout the sales and construction cycles, improving adherence to UK FSA regulations.
- > Group IT managers will use the multi-tenancy capability to achieve economies of scale in their investment in the system. Other business units across the group will adopt their own variations of the application.
- > The flexibility of the Microsoft environment will allow the IT department to rapidly and inexpensively adapt to the fast moving climate by changing workflows, customising entities and integrating with new systems.
- > The familiarity of the Microsoft interface, and its seamless integration with other Microsoft productivity and collaboration tools, greatly shortened training time and increased adoption.
- > Marketing may utilise the in-built Campaigning and Reporting capabilities of Microsoft Dynamics CRM to better understand their customer base and track campaign effectiveness.

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