



Case Study

Customizations and Support for US-Based Insurer to Increase Customer Visibility to Management

Client

The client has set a standard in equipment breakdown insurance, which was formerly called boiler & machinery insurance. Along with other specialty insurance and reinsurance coverages – it also included data and cyber risk, employment practices liability, contractor's errors and omissions, and identity theft insurance.

Challenges

The client needed to support its customers better with:

- Migration of CRM processes from the SalesForce system to D365.
- Outlook integration with CRM online, providing Email to Case feature.
- Data migration from the SalesForce instance to the new CRM system.

LTIMindtree Solution

The client needed to support its customers better with:

- Customization of the current system to implement Salesforce-based processes.
- Familiar and intuitive user interface.
- Data was migrated from Salesforce to D365 online using custom built solution for Data migration.

Business Benefits

- Sales process standardization.
- Scalable solution for attachment migration, custom-based solution with full user control.
- Centralized customer information.

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