



## 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.

**LTIMindtree** is a global technology consulting and digital solutions company that enables enterprises across industries to reimagine business models, accelerate innovation, and maximize growth by harnessing digital technologies. As a digital transformation partner to more than 700+ clients, LTIMindtree brings extensive domain and technology expertise to help drive superior competitive differentiation, customer experiences, and business outcomes in a converging world. Powered by nearly 90,000 talented and entrepreneurial professionals across more than 30 countries, LTIMindtree – a Larsen & Toubro Group company – combines the industry-acclaimed strengths of erstwhile Larsen and Toubro Infotech and Mindtree in solving the most complex business challenges and delivering transformation at scale. For more information, please visit [www.ltimindtree.com](http://www.ltimindtree.com).