



Case Study

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# Intelligent Lead Management for **US-based Reinsurance Broking Firm**

## Client

The client is a US-based reinsurance broking firm, with expertise in strategic advisory services and industry-leading analytics.

## Challenges

- ✓ Inefficient sales process with long sales cycle and turn-around-time
- ✓ Lack of a lead-capturing mechanism from the company website
- ✓ Solution required to simplify marketing campaigns, standardize business processes, and increase ROI
- ✓ Ability to analyse opportunities and manage sales forecast and pipeline
- ✓ Integration of Learning Management system for a seamless experience.

## LTI Solution

- ✓ Implemented Pardot-based solution for lead-capturing, scoring, and filtering based on time spent on each product on the website
- ✓ Implemented Steelbrick CPQ for faster and streamlined pricing and quoting
- ✓ Enhanced and managed 9 integrations for revenue, opportunity, account, etc. viz. Miller Heiman, Peoplesoft, WebCas.

## Business Benefits

- ✓ Simplified and faster execution of marketing campaigns, with tracking of customers interaction with content
- ✓ Better segmentation of targeted customers based on pre-defined criteria leading to more personalized content
- ✓ Building of customized pages and responsive apps made easier, using new drag-&-drop features.

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