Case Study
D365 CRM Implementation for Re-insurance Industry Leader
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 had to achieve standardization, and:
- Upgrade of the implemented MS CRM 2013 to D365 to meet requirements for sales, marketing & field service of the client.
- Standardize the sales process across the organization.
- Attain a 3600 view of the entire sales of the organization.

LTI Solution
- Configuration and customization of D365 CRM as per the client’s requirement.
- Report Development using SSRS.
- Review of training material and training content.
- Assist in data migration activities.
- Code Analysis and review.
- Develop integration related / SSIS packages.
- Integration with other systems.

Business Benefits
- Efficiency improvement of the sales team members, and improving productivity.
- User-friendly application.
- Easy reporting using SSRS.
- Right use of information for effective decision making.
- Improved communication and quality improvement.