



Let's Solve

Case Study

D365 CRM Implementation for
Re-insurance Industry Leader



A Larsen & Toubro
Group Company

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 360 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

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