



Let's Solve

# Case Study

Customizations and Support for US-based Insurer to increase customer visibility to management



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 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

## LTI 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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