



Case Study

Transforming Marketing Infrastructure for **US-based Fortune 500 Insurance Firm**

Client

The client is a US-based Fortune 500 commercial lines property holding company operating in Insurance and Reinsurance business.

Challenges

- ✓ Lack of a 360-degree view in the system
- ✓ Inefficient governance and reporting
- ✓ Wanted to harness the potential of Salesforce Sales & Marketing cloud implementations
- ✓ Eliminating/ reducing data and object duplicity
- ✓ Leverage Salesforce platform for accelerated rollout of preference management

LTI Solution

- ✓ Streamlined Case Management to reduce backlog by 50% (Sales & Marketing Cloud) and cleared within 18 weeks
- ✓ Rolled out Preference Center (Marketing Cloud project) in just 2 months
- ✓ Migration of 16 Sales-Cloud organizations to Lightning framework
- ✓ Gathered and designed strategic and long-term initiatives to keep the focus aligned on requirements as per business priority

Business Benefits

- ✓ >40% efficiency gains with personalized campaigns
- ✓ 100% automation of preference tracking and updating in Marketing cloud
- ✓ Technical debt reduction by code analysis and object structure rationalization.
- ✓ Bridged gaps around people, process, and technology, using an evolutionary roadmap design & blueprinting

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