



Microsoft Dynamics Customer Case Study



Pacific Life Re's chosen solution of Microsoft CRM enabled increased sharing of client information in a singular repository database across the organisation, ensuring every client touch point enhances its reputation as a specialist reinsurer and a highly influential and respected provider.

Customer:
Pacific Life Re

Industry:
Insurance

Country or Region:
Europe & Asia

Customer Profile:
Pacific Life Re is a specialist life reinsurer offering a comprehensive range of reinsurance solutions and support to insurance clients in the UK, Ireland and Asia.

Pacific Life Re concentrates on technical excellence and proven commercial expertise across all functions to produce a highly effective, multi-disciplined team delivering exceptional service to each of their clients.

Pacific Life Re was formed following the acquisition by Pacific Life Corp of the International Segment of Scottish Re in July 2008. We have built a strong experienced team and have earned a reputation for technical excellence, responsiveness, innovation and excellence in service delivery to our clients who included some of the UK's leading insurance providers.

Web Site: www.pacificlifere.com

Business Needs

Pacific Life Re is a specialist life reinsurer offering a comprehensive range of reinsurance solutions and support to insurance clients in the UK, Ireland and selected markets in Asia via their Singapore and Japan Offices.

Pacific Life had identified a requirement to deploy a centralised customer management solution, with the key objective to support its business relationships and engagements in the UK, Ireland and Asia. The company understands that competitive insurance and reinsurance businesses must consistently infuse their offerings with new technologies and more customised services. The solution enables coordinated access to and management of information relating to external contacts across all client facing teams.

Pacific Life Re wanted to overcome the inefficiencies of each person maintaining his or her own prospect or customer lists in Microsoft Excel or Outlook. Pacific Life Re also needed to replace its old contact management systems, which was hard to use and maintain without amassing large IT consulting and system fees.

With no centralised CRM system, duplication was sometimes a problem and seeing an overall view of the client or prospect was not easy to produce. The company also wanted to improve on the manual customer processes that made tracking, accountability, and the ability to capture institutional knowledge difficult.

A flexible solution was key for Pacific Life Re; they required a single solution that could be tailored to manage its multiple, distinct business units that worked from within Microsoft Outlook.

The Solution & Pythagoras

Pacific Life Re started to engage with Pythagoras after registering for one of their Microsoft Dynamics CRM workshops. Pythagoras, a Microsoft Dynamics CRM Gold Certified Partner, implemented Microsoft Dynamics CRM at Pacific Life Re to help improve productivity, performance, reporting and profitability to support their new business model.

In the reinsurance industry, continually enhancing the relationships you have with customers and prospects is essential to achieving profitable and sustained growth. Increased competition, a complicated selling process and a heterogeneous IT infrastructure can make that a challenge. Microsoft Dynamics CRM was chosen as a tool by Pacific Life Re to help simplify these complicated selling processes and offers its users a reliable and easy to use platform to help manage tenders, prospects and customer relations.

Pacific Life Re selected Microsoft CRM for its superior ease of use, opportunity management, flexibility and Outlook email collaboration. The solution has made individuals more efficient and productive through its tight integration with Microsoft Outlook and existing office systems, as these cut down on switching software applications, and all customer information resides from within Microsoft Outlook.

The solution enables the desired coordinated access to and management of external contact details by all client facing teams. The company implemented 45 users in its UK and Asia offices.





“The solution has made individuals more efficient and productive through its tight integration with Microsoft Outlook and Office.”

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“The project was delivered on time and on budget.”

Benefits

Pacific Life Re’s chosen solution of Microsoft Dynamics CRM now enables increased sharing of client information in a singular repository database across the organisation, ensuring every client touch point enhances its reputation as a specialist reinsurer and highly influential and respected provider.

Further benefits include:

- Seamless integration with Microsoft Office applications
- Greater efficiency and productivity
- Flexibility
- Easy user adoption
- Accurate metrics reporting, integration etc.
- Sharing of client information in a singular repository across the organisation
- Desired coordinated access to and management of external contact details by all client facing teams.

Results

The project was delivered on time and on budget, and there is scope for further expansion in the future. Pacific Life Re now touches the customer as one company, rather than as separate business units or individual employees.

Microsoft Dynamics CRM has enabled Pacific Life Re to consolidate customer information previously spread across multiple databases and provides a firm foundation to drive the business forward with consistent, accurate metrics reporting.

User adoption was eased by the seamless integration with Microsoft Office applications, with all customer activity residing within Microsoft Outlook.

Pythagoras is working closely with leading Insurance and Reinsurance companies, many of whom are in the London Market as well as the wider financial services marketplace. Together we are leading the way with innovative technology applications that are helping these organisations collaborate and manage relationships with partners and customers more effectively.

By joining up information systems across your business, a single view can be gained of each customer or supplier relationship, enabling departments to understand their customers better and target their services more accurately.

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