



Custom CRM helps leading insurer increase customer satisfaction.

A CUSTOM CRM (A.K.A. THE PRODUCT) BUILT BY PGS SOFTWARE HELPED UK'S LEADING INSURER (A.K.A. THE CLIENT) TO SIGNIFICANTLY INCREASE CUSTOMER SATISFACTION.

The Client's digital-focused strategy aims to offer customers more personalised products and services – the **new CRM web application** enabled the insurance company's Agents to better support customers, by allowing them to work from **one unified platform while providing a broad range of services**.

BUSINESS NEED

The insurance sector is seeing rapid change in technology and forms of digital distribution. Having recognised this accelerating market trend, **the Client recently adopted a digital-focused approach** in order **to offer customers higher quality, more personalised products and services**.

Realising that customers would like to connect and conduct business digitally, the company decided that they **needed a single, online web application that would be scalable** and that would accommodate **varying servicing functions**. That's when PGS Software stepped in to create a custom, **unified CRM that would offer customer identification across the Client's organisation** and help Agents assist customers with their insurance applications.

The lack of a unified CRM meant that **there was no synchronisation** between what the Agents saw in the CRM and what the customers saw on the website which resulted in poor customer service. Additionally, seemingly simple **changes to the policy (e.g. change of residence)** have significant impact on the customers' insurance policy rates and coverage – and the **impact of these changes would need real time resolutions**.

SOLUTION

The **bespoke CRM web application** built by PGS Software helps the Client's Agents to **provide services to customers worldwide across a span of business lines**. It includes general insurance specific functions, customer IDs, and the company's insurance registration functions.

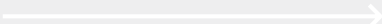
To create the CRM, **PGS Software used one of the Client's already existing applications as a framework**, leveraging its existing functionality. **The Product meets two important use case requirements**. Previously, the Agents used a system that wasn't connected to the Client's e-commerce website and when users requested a quote, the Agents weren't able to see what the customer saw – the CRM built by PGS Software fully resolves this issue.

Firstly, it **allows Agents to see what customers can see** by using their own secure identity to log into the CRM. Secondly, **it allows Agents to view and update functions** by sending them directly to the functionality page of the CRM, where they can complete specific tasks, e.g. update customer profiles. Additionally, **the CRM notifies the Agents whenever a customer is in need of their assistance**.

BUSINESS BENEFITS

Adopting a digital-focused strategy has allowed the Client to capitalise on being a true end-to-end insurance provider as customers are recognising the convenience, ease, and speed of digital solutions.

The Client is the **only insurer in the UK that is able to meet customers' needs in a true end-to-end manner**. The Client's customers report that the simplicity of having one provider who is **able to meet all their insurance, savings, and investment needs** is immensely **convenient and cost-effective**.



The CRM created by **PGS Software** has significantly helped the Client's Agents to best service customers. It gives Agents **easy access** to all of the necessary resources in a **unified, highly intuitive**, yet customisable and **dynamic system**.

Before the Product was put in use by the Client, the Agents needed to go through all the rather complicated registration steps with the customer in order for them to successfully apply for insurance. Since they've been **using the CRM**, the Agents have **reported that it is much easier for them to register customers**, making the whole process quicker and more straightforward.

The CRM also **informs Agents of any changes to customer profiles** such as place of residence, marital status, etc., allowing them to tailor their conversation to **the customer's immediate needs** - making the **relationship between the Agent and the customer more personal** and better-informed.

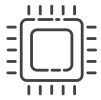
The CRM helps the Client to **meet their business and digital goals** as a true end-to-end insurance provider by supplying them with **one platform from which all customer-related activities can be conducted**. Thereby, allowing the Client to address all customer needs, whether that's life insurance, general insurance, accident and health insurance, or investments, in one easy-to-use system - **greatly increasing customer satisfaction**.

PROJECT DETAILS



SOLUTIONS

AWS Cloud, HP servers, Continuous Integration, Automated Testing, AppFabric, Azure Redis, IBM Tivoli Access Manager, Application Security Testing



TECHNOLOGIES

.NET, C#, JavaScript, jQuery, Knockout, MVC, Jasmine testing, T-SQL, Dapper, GIT, Unit testing NUnit, REST API, SOAP API, RequireJS, CSS 3



TOOLS

Selenium, Jenkins, DevTest, Specflow, SOAP UI, Postman, Visual Studio, ReSharper, Microsoft SQL Server Management Studio, Chutzpah Test Runner, BlanketJS, SourceTree, GIT Bash, Jira, Confluence, Bitbucket, SonarQube, CheckMarx



TEAM

3 Scrum Teams working on one enterprise application. In total: 14 .NET Developers (12 from PGS Software, including 4 Lead Developers), 6 Frontend Developers, 2 Automation Testers, 5 Manual Testers (3 from PGS Software), 2 Scrum Masters (1 from PGS Software. The other on the Client's side who worked with PGS Software's Scrum Teams: 3 Product Owners, 4 Business Analysts, 2 UX Designers, 4 Solution Designers)

ABOUT THE CLIENT

The Client is a British multinational insurance company whose headquarters are located in London, UK. The Client's organisation services over 30 million customers across 16 countries in Europe, Asia, and North America. In the UK, the Client is the largest general insurer and a leading life and pension provider as well as the second largest general insurer in Canada.

ABOUT PGS SOFTWARE

PGS Software S. A. is a public listed IT company providing custom software products and end-to-end business services to international clients from Western Europe.



"It's fantastic! I can see my team using the Product, doing DPA and naturally moving to promote the Client."

"It was so much easier to register the customer rather than having to explain how to register and where the customer needs to go online."

"The [end user's company] claims teams in Health are very positive about the Product; it increasingly feels like a great solution working really well across the different businesses."

Health & Operations Director

"As soon as I took the policy number, I instantly had a message to tell me that the client was deceased. That helped massively with how to handle the call."

"I have access to everything I need at my fingertips. I use a simple, intuitive customisable and dynamic system."

"It enables me to give outstanding service to my customers, regardless of their demand, product holdings or contact channel."

FOR MORE INFORMATION ABOUT OUR SERVICES:

PLEASE CONTACT US AT **+48 71 798 2692** OR **Info@pgs-soft.com**
OR VISIT OUR WEBSITE **WWW.PGS-SOFT.COM**