

The Company

With 100 employees, Lebanese company AROPE delivers a full range of insurance services to around 40,000 customers.

The Challenge

The sales team at AROPE lacked an effective customer relationship management (CRM) tool to track and store real-time customer information, supervise sales team work, and generate reports.

The Solution

Working with Microsoft Gold Certified Partner Netways, AROPE implemented Microsoft Dynamics CRM for its sales team to track customer information.

The Benefits

- Productivity increased by 15%
- Customer retention improved
- Easily customized solution

Sales Employees at Arope Insurance Company Increase Productivity by 15 Per Cent

Overview

Sales employees at Lebanese insurance company AROPE were struggling to cope with an expanding customer base, which had recently hit 40,000 people. It needed a management solution that connected customers to its insurance policies. Existing paper-based systems meant that tracing customer histories was often a slow process, and risked multiple employees contacting the same customer. To solve these issues, the company worked with Microsoft Gold Certified Partner Netways and implemented Microsoft Dynamics CRM to integrate with the company's core policy management system. Now the sales team is better equipped to check customer activity, view policy information, and produce detailed reports from single data entry. Users are already saving at least two hours each week from reduced administration. Overall, the project coordinator predicts that the sales team's productivity has increased by 15 per cent.

The Company

Since it was established in 1974, AROPE has become one of Lebanon's leading insurance companies. An excellent customer service record has helped it maintain an annual growth of 20 to 25 per cent during the past five years. Its 100 employees look after 40,000 customers throughout Lebanon. They help deliver a range of health, life, and motor insurance policies to people in a variety of demographic groups.



The Challenge

The company wanted to boost customer retention rates, but it depended on employees having better access to information on client policies. Tamara Nassereddine, Customer Relationship Management Project Coordinator, AROPE, says: "Because our insurance contracts run on an annual basis, people can switch easily between companies. It was important employees contacted clients well before policies finished to increase client retention."

As it stood, no automated system alerted employees to insurance policies about to expire. In addition, it wasn't clear if a policy had been renewed or a colleague had contacted a customer about their policy. Finally, because policy data wasn't stored centrally, producing management reports was time consuming.

Nassereddine says: "Employees relied on an information management system (IMS) to claim and store all policy documentation. We needed a customer relationship management (CRM) tool that would integrate with this and also standardise the way we worked, helping us refine our processes and helping the sales team easily track customer-oriented information."

The Solution

Nassereddine says: "We also researched what was available in the marketplace, but quickly realised that Microsoft Dynamics CRM was the right fit for our organisation. It is much more flexible than competitive solutions and we can easily adapt it to suit our business needs. Microsoft has an excellent reputation in this sector, and we have worked with Netways on a number of successful projects."

The sales team can access a customer's policy information via a Web-based portal in Microsoft Dynamics CRM. This is possible due to Netways using Microsoft BizTalk® Server 2002 to develop a one-way integration between Microsoft Dynamics CRM and IMS at AROPE. Rawan Fathallah, Enterprise Solution Consultant, Netways, says: "This process was kept simple because BizTalk Server 2002 provides a specific process that helps two different solutions communicate. For all other customisations we used the Microsoft .NET Framework for ease and flexibility."

Now, sales employees can:

- Enter tasks directly into the system and extract the same data when they need to compile management reports.
- Access financial information about their clients.
- Extend the solution to Microsoft Office Outlook® 2003, to book customer meetings directly into their calendar.
- Track policy lifecycles and customer history.

The Benefits

Since deploying Microsoft Dynamics CRM, sales employees at AROPE can group their customers in a way that promotes easier management. They can easily track customer history, policy lifecycles, and are made aware of important deadlines.

Employees Increase Productivity by 15 Per Cent

Employees no longer have to rely on paper-based customer information. Faster access to data and improved collaboration with colleagues has created less administration work, and is saving users at least two hours each week. Nassereddine says: "With less paperwork to manage, our employees have more time to build trusted relationships with clients. Since we deployed the solution, users have increased their productivity by 15 per cent."

Sales Team Improves Customer Retention

Sales employees can track new customer leads easily. With Microsoft Dynamics CRM, the sales team at AROPE has standardised processes when dealing with customers. Streamlined and coordinated tasks mean that they no longer waste time and have different people from AROPE contacting the same customer about the same information. The more details employees have, the better equipped they are to respond quickly to changing customer needs and preferences.

When sales employees contact a customer, the necessary information is at their fingertips. This helps strengthen customer loyalty and drive sales. Also, as a result of the integration with IMS, automated alerts can be sent through Microsoft Dynamics CRM. These alerts prompt employees to take appropriate action, such as contacting a customer one month prior to their policy expiring—and helping ensure the company doesn't lose the client.

Nassereddine says: "Using Microsoft Dynamics CRM, our sales team can better prepare itself for important customer meetings, because they can access sales opportunities and service histories.

"What's more, we can show customers the benefits of our policies quickly, and this helps our sales team be more successful."

Easy Customisation Makes Solution More Effective

Netways customised this solution with .NET technology. This framework made it easy for developers to tailor Microsoft Dynamics CRM to the exact needs of employees at AROPE. Using the policy management module, when a customer enquires about a specific product, employees can simulate through Microsoft Dynamics CRM the customer's rate and the desired product to work out a premium. Since the solution went live, sales people have been able to carry out this process instantly when face to face with a customer or over the phone.

Nassereddine says: "We've had good feedback from our employees since the customization, because our sales team can respond to customer enquiries, and deliver the right answers quickly. We continue to work on improving the solution. Ideas from our sales employees can easily lead to additional customizations as our needs increase."



Technologies used

- Microsoft .NET Framework
- Microsoft BizTalk Server 2002
- Microsoft CRM 1.2
- Microsoft Office Outlook 2003

Who are we?

Netways is a Microsoft Gold Certified Partner with competencies in Information Worker and Business Solutions. Our solutions target a wide array of enterprise and small and medium size business challenges. In addition to our partnership with Microsoft, Netways has a well-built alliance with Captaris for providing fax automation, document management, and business process automation solutions. By leveraging our deep industry and technical expertise, Netways is able to provide customized end-to-end solutions for clients based on worldwide standards. The services we provide include consultancy, development, implementation, outsourcing, and training.



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