

A leading international Insurer increases sales, market share and customer service levels with a customized Digital Marketing solution



Client

A leading international insurance organization serving customers in more than 100 countries and jurisdictions.

Business Objective

The Client needed to find ways to improve pipeline visibility and to enhance the Broker experience in their interactions with the company, making it easier for Brokers to transact business.

Solution

- Implemented Sales and service cloud applications, customized to meet the client specifications and fully integrated to the existing legacy applications
- Provided: Full delivery capabilities across design, development and testing
- Implemented across a blended bestshore resource model
 - » Onsite resources who work closely with business to understand their requirements and determine how they can be implemented in SFDC
 - » Offshore team is responsible for design and implementation
- Unit testing, UAT test support and Salesforce Admin and production support services

What benefits were delivered?

- Improved Financial Advisor productivity and retention
- Increased sales, market share and customer service levels
- Provided ability to start Fixed Income Marketing
- Effective product management
- Reduced time-to-market
- Enhanced 360 degree client centric model
- Improved home office support team functionality and efficiencies

Technologies

- Salesforce.com (Sales and Service cloud)

Integration with

- LaserApp
- Docupace
- Customer MDM
- National Financial Services
- ServiceNet
- OCR/ICR application
- Data Warehouse
- Portal application

Partnership

Salesforce.com

About Mphasis

Mphasis (BSE: 526299; NSE: MPHASIS) applies next-generation technology to help enterprises transform businesses globally. Customer centricity is foundational to Mphasis and is reflected in the Mphasis' Front2Back™ Transformation approach. Front2Back™ uses the exponential power of cloud and cognitive to provide hyper-personalized (C=X2C2 TM=1) digital experience to clients and their end customers. Mphasis' Service Transformation approach helps 'shrink the core' through the application of digital technologies across legacy environments within an enterprise, enabling businesses to stay ahead in a changing world. Mphasis' core reference architectures and tools, speed and innovation with domain expertise and specialization are key to building strong relationships with marquee clients.

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