

salesforce

Salesforce for Leading Insurance Firm in the Netherlands

Client Profile



Our client is a renowned Insurance Firm based in the Netherlands, offering a wide range of insurance solutions, including health, property, and life insurance. The company focuses on providing a variety of insurance services suited to the particular needs of individuals and companies across the country.

Having served the insurance industry for over a decade, the firm has gained a strong reputation for offering reliable coverage and superior customer service. Their goal is to simplify the insurance process while ensuring policyholders have access to prompt assistance and accurate information.

Project Background

Our client approached CRM Masters Infotech to streamline their policy management processes and improve customer engagement. The firm was using multiple disconnected systems to manage customer records, policy renewals, claims processing, and communication, which led to inefficiencies and data loss.

They needed a solution that could :

1. Centralize customer and policy data for a unified view.
2. Automate policy renewal notifications and claims management.
3. Enhance customer support through multiple communication channels.
4. Enable personalized marketing campaigns to retain policyholders and attract new customers.



Business Type

B2C (Business to Consumer)



Technology We Used



Salesforce Financial Services Cloud



Salesforce Service Cloud



Salesforce Marketing Cloud



Salesforce Omni-Channel



Salesforce Flow



Challenges Faced by Our Client

➤ Fragmented Policy and Customer Data

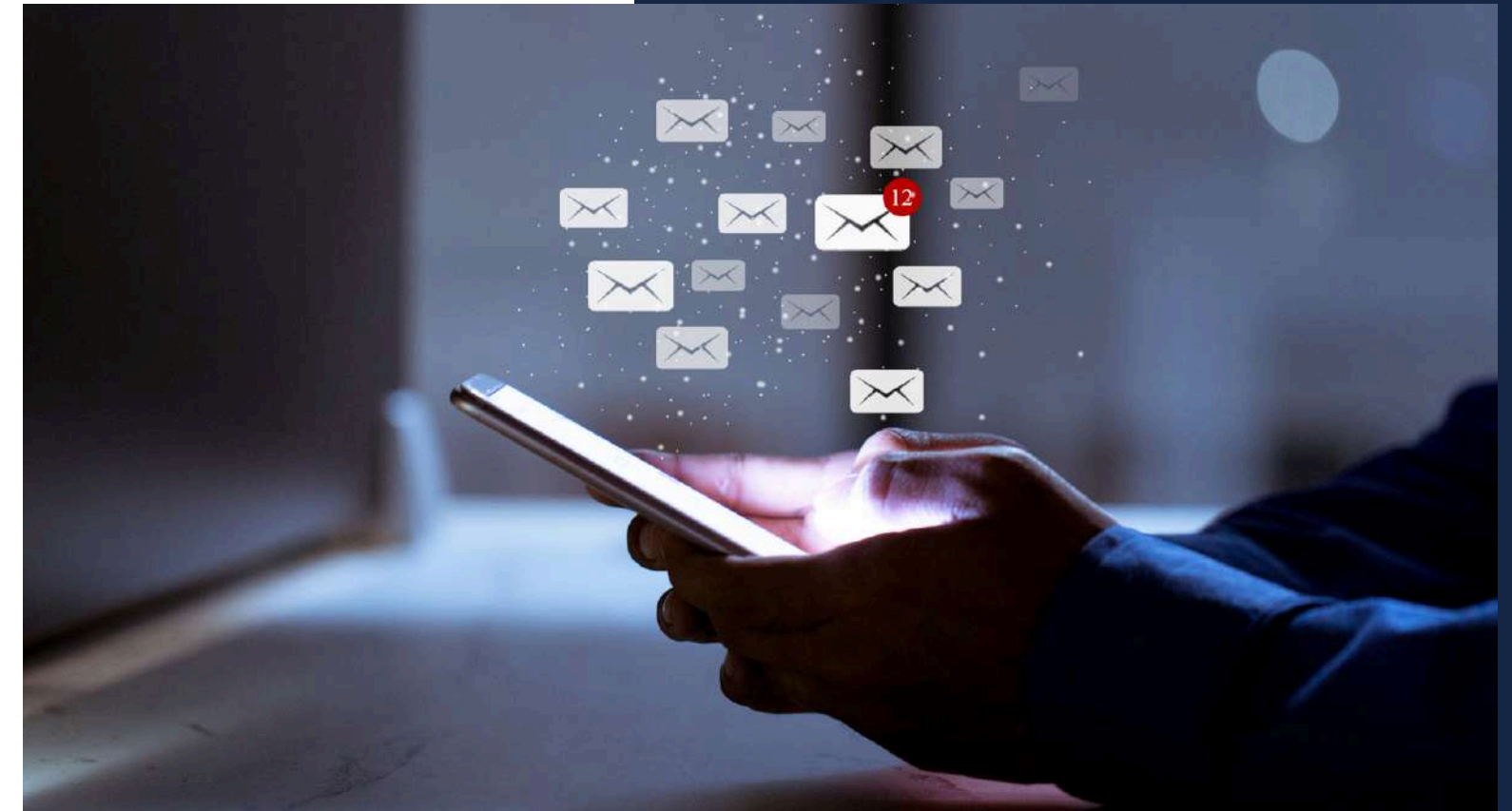
Customer information, policy details, and claims history were stored across different platforms, making it difficult for agents to access real-time data and provide timely assistance.

➤ Manual Claims and Policy Renewal Processes

Claims approvals and policy renewals were managed manually, leading to delays, errors, and missed opportunities for upselling and cross-selling.

➤ Limited Communication Channels for Customer Support

Customers had to rely on phone calls and emails for policy inquiries, resulting in long wait times and dissatisfied clients.



➤ Lack of Personalized Marketing Campaigns

The firm lacked an automated system to analyze customer data and send targeted marketing communications, leading to missed opportunities for customer retention and new acquisitions.



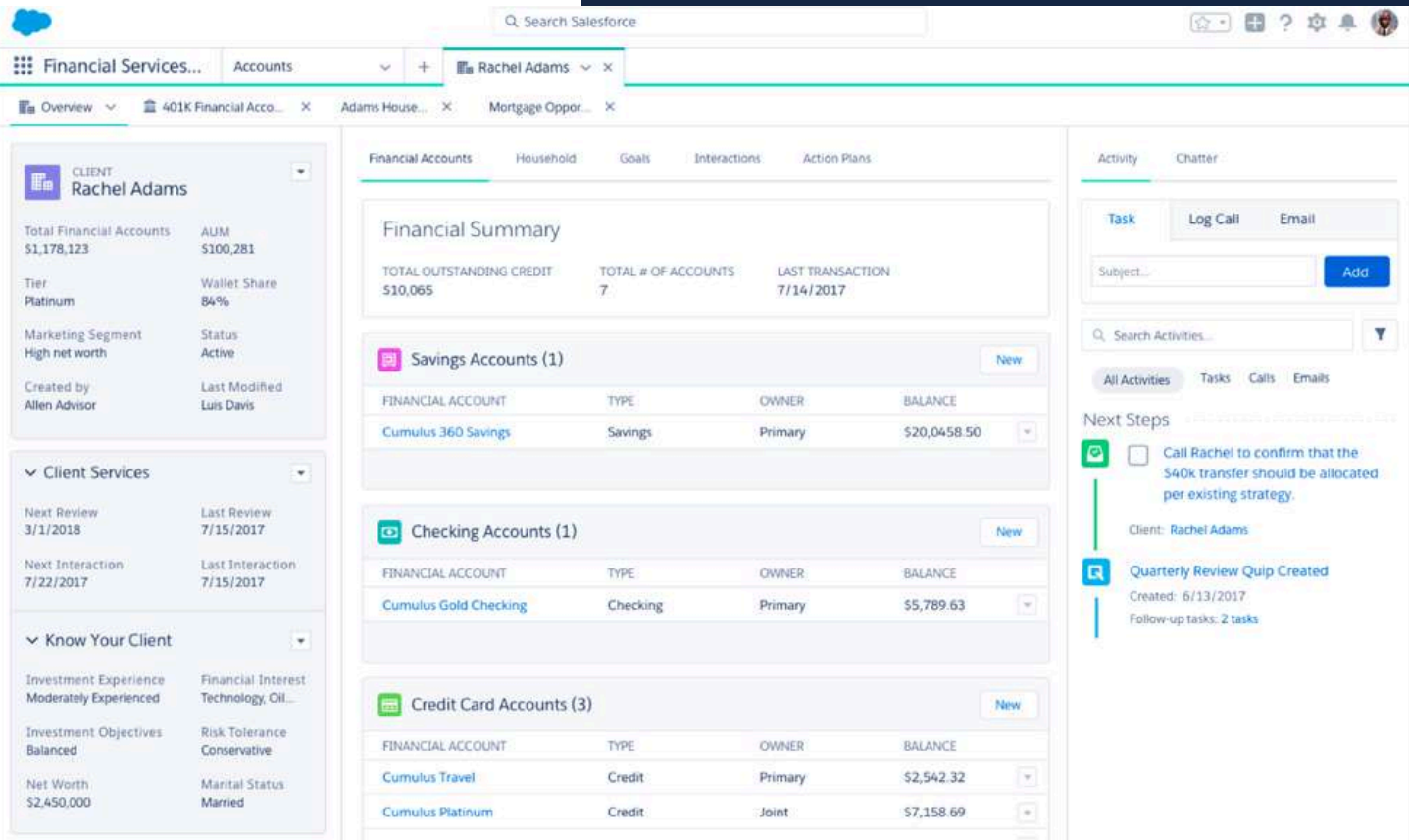
Our Solutions

- **Salesforce Financial Services Cloud for Centralized Data Management**
- **Salesforce Flow for Automating Claims and Policy Renewals**
- **Salesforce Omni-Channel to Achieve Good Rating**
- **Salesforce Marketing Cloud for Personalized Campaigns**
- **Salesforce Service Cloud for Streamlined Customer Support**



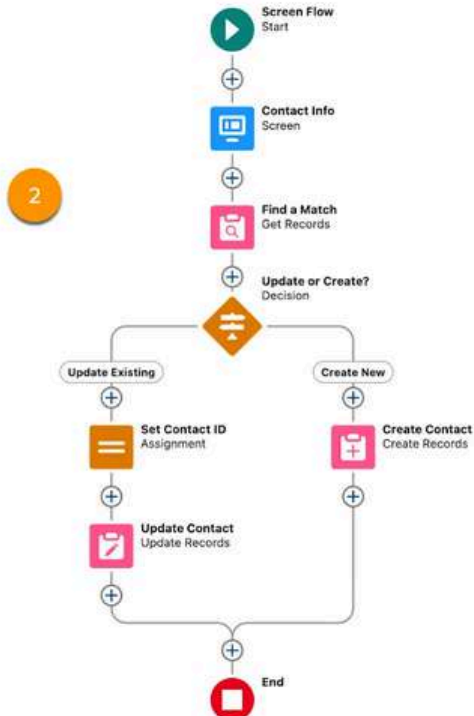
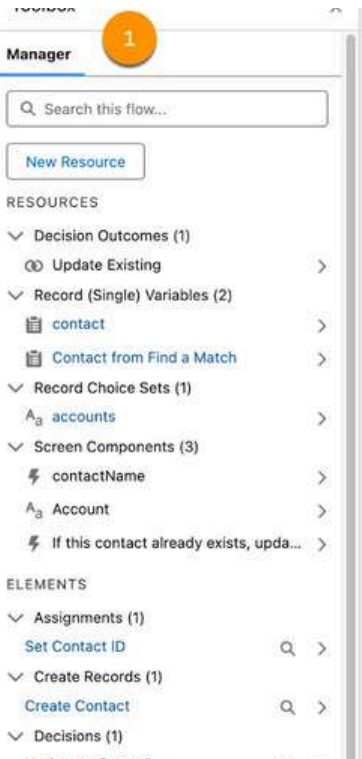
➤ Salesforce Financial Services Cloud for Centralized Data Management

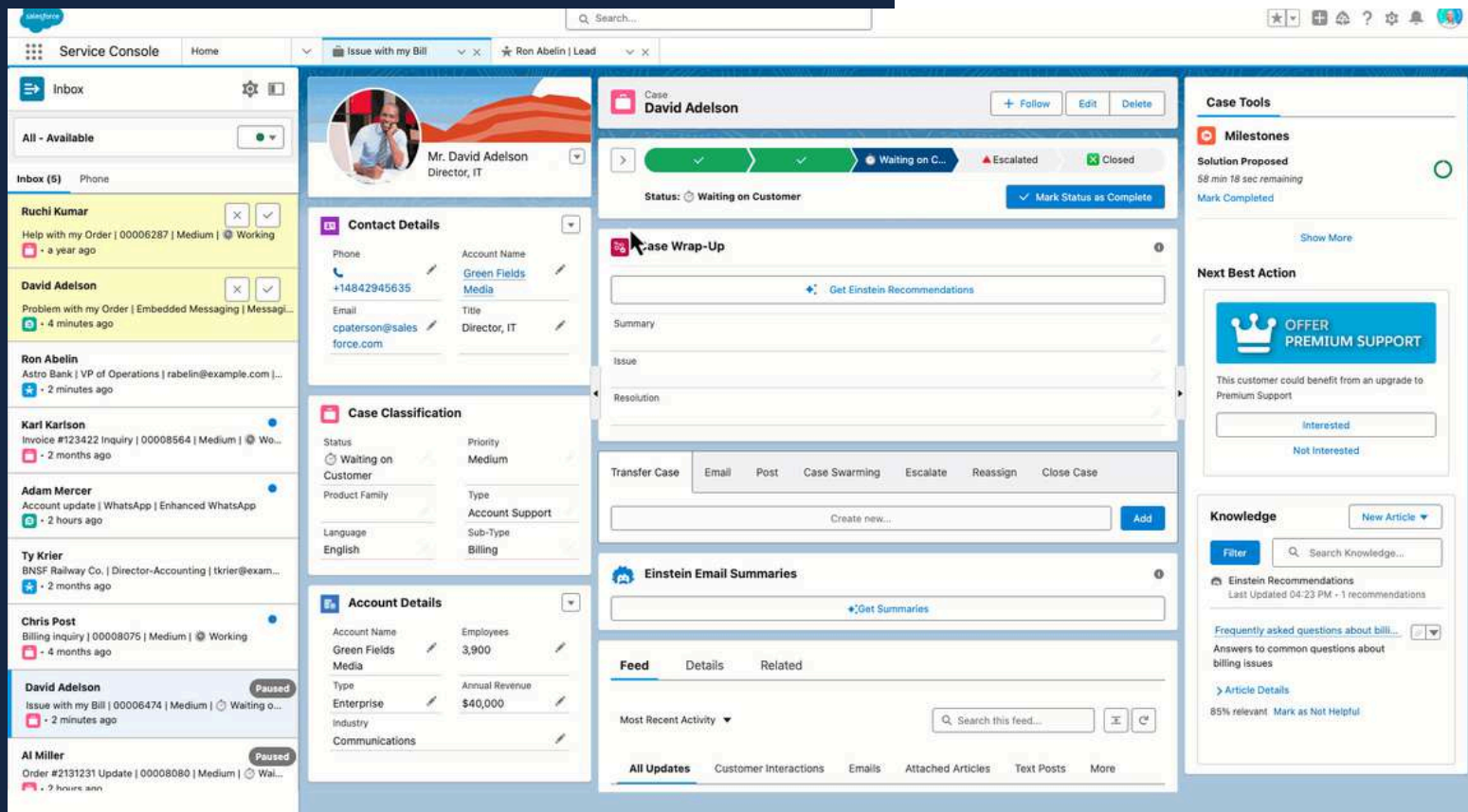
We implemented Salesforce Financial Services Cloud to consolidate customer profiles, policy records, and claims history into a unified system. This provided the firm with a 360-degree view of policyholders and enabled agents to access real-time information for better decision-making.



➤ Salesforce Flow for Automating Claims and Policy Renewals

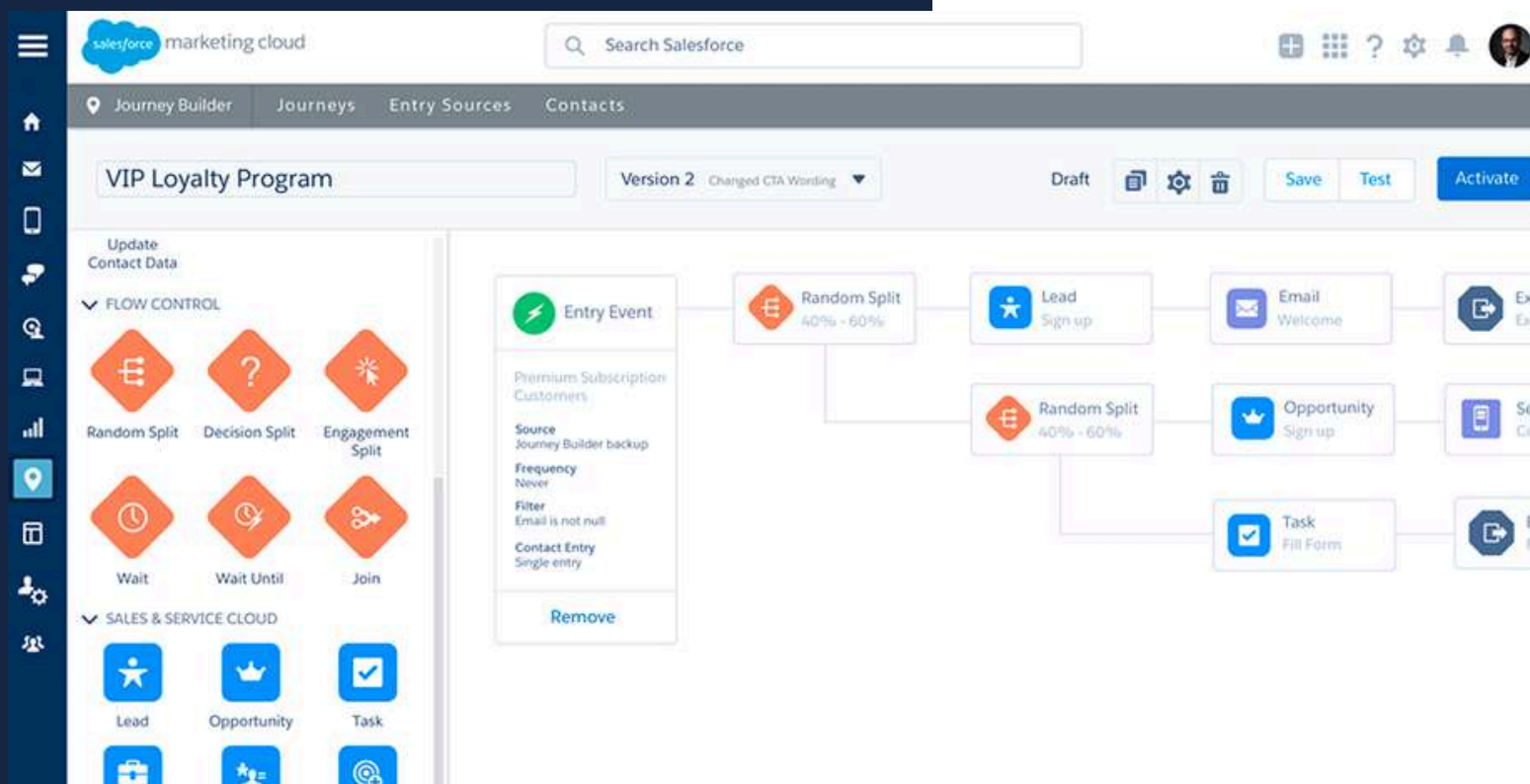
To reduce manual effort and errors, we used Salesforce Flow to automate claims processing and policy renewal notifications. The system automatically notified policyholders about upcoming renewals and routed claims to the appropriate departments for quicker approvals.





Salesforce Omni-Channel to Achieve Good Rating

We integrated Salesforce Omni-Channel to allow the client to manage customer inquiries through multiple channels, including phone, email, chat, and social media. This ensured faster response times and improved customer satisfaction, which will help in achieving good ratings from customers.

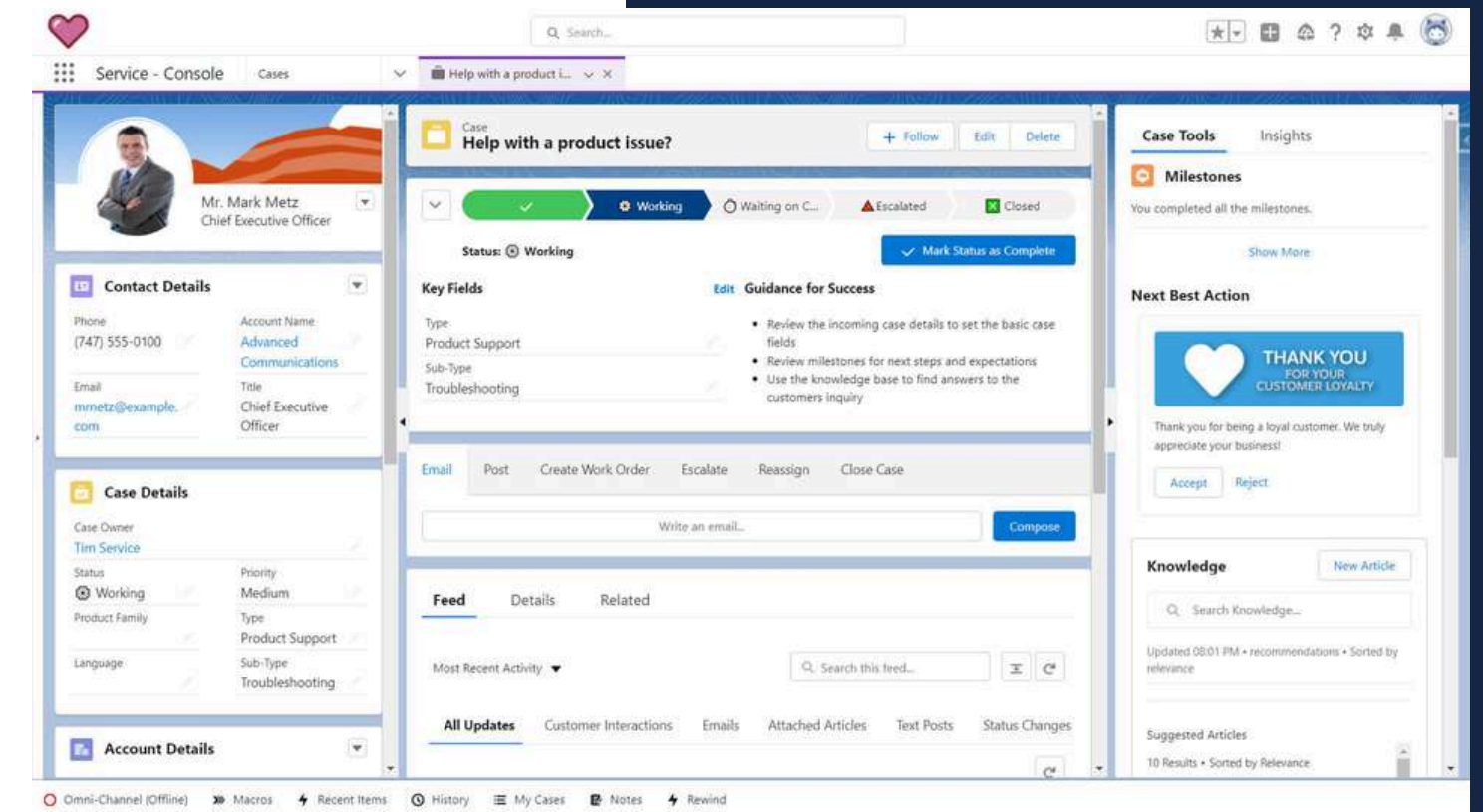


Salesforce Marketing Cloud for Personalized Campaigns

To enhance customer retention and attract new policyholders, we deployed Salesforce Marketing Cloud to create targeted email and SMS campaigns based on customer preferences, policy history, and behavioural data. This allowed the client to send personalized offers and relevant policy updates.

➤ Salesforce Service Cloud for Streamlined Customer Support

To manage customer queries and claims efficiently, we leveraged Salesforce Service Cloud to implement case management, track service requests, and automate task assignments. This allows advisors to keep track of who is calling, what policies they own, recent interactions, and feedback stories.





Results

CRM Masters delivered a customized and scalable Salesforce solution that transformed the client's insurance operations.

➤ Consolidated Policy and Customer Data

Achieved a unified database for policyholders, claims, and communication history, improving agent efficiency by 60%.

➤ Automated Claims and Renewal Processes

Reduced policy renewal and claims approval time by 70%, minimizing errors and ensuring timely renewals.



➤ Enhanced Customer Support Across Channels

Increased customer satisfaction by 40% through faster response times and multi-channel communication.

➤ Targeted Marketing and Improved Retention

Achieved a 25% increase in customer retention through personalized and data-driven marketing campaigns.

➤ Increased Operational Efficiency

Reduced manual workload by 75% with automated workflows and seamless data integration.



Performance Improvements



60%

Consolidated Policy and
Customer Data



70%

Automated Claims and
Renewal Processes



40%

Enhanced Customer Support
Across Channels



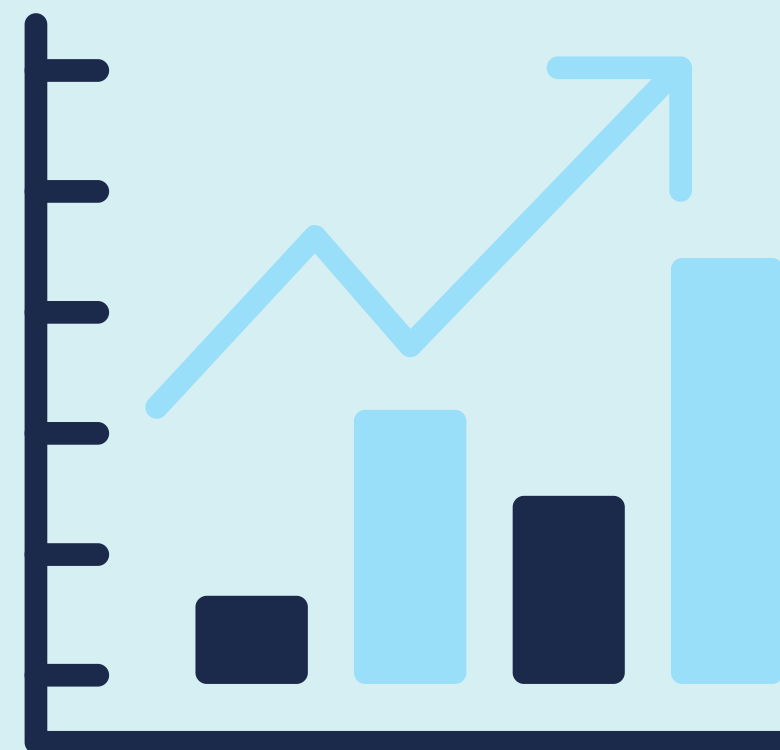
25%

Targeted Marketing and
Improved Retention



75%

Increased Operational
Efficiency





About CRM Masters Infotech

ENABLING GROWTH THROUGH
DIGITAL TRANSFORMATION

CRM Masters Infotech is a trusted Salesforce consulting partner, specializing in delivering tailored CRM solutions for businesses across diverse industries. With a **global footprint in India, the UK, and the USA**, we empower organizations to leverage Salesforce to improve customer engagement, operational efficiency, and business growth. Our team of **100+ certified Salesforce experts** ensures seamless implementation, customization, and ongoing support to drive digital transformation for our clients.

LET'S TALK & FIND YOUR SOLUTION



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Schedule an Appointment

