



from left to right: Pierre Alexandre Kablitz (Vitis Life), Pierre Beeleñ (Vitis Life) et Valérie Daems (Nerea)

Microsoft Dynamics CRM

Improved monitoring of sales activities and more efficient information sharing at Luxembourg insurer Vitis Life thanks to Microsoft Dynamics CRM

“How can we guarantee that information concerning customers is shared and that we will not lose knowledge about a customer when a sales representative leaves the company, for instance?”

*Pierre Alexandre Kablitz,
Head of IT, Vitis Life*

A specialist in individual life insurance policies, Vitis Life manages a portfolio of more than €2 billion in assets, which represents more than 6,000 contracts. Relying on a sales team that operates remotely from mobile desks, Vitis Life would like to implement an improved monitoring of the activities of sales representatives as well as more efficient information sharing in the organisation. Already strongly geared to the Microsoft platform, Vitis Life has decided to implement Microsoft Dynamics CRM. User-friendly and flexible, the solution is now emerging as the hub for improved monitoring and more efficient sharing of information concerning customers and projects.

Whereas the mobility of sales teams has become commonplace thanks to technology, this development nonetheless continues to pose other challenges in the financial sector as well as in many other lines of business.

Created in 1955, Vitis Life is a Luxembourg-based insurer specialising in upmarket life insurance policies and is committed to the freedom to provide services. The company has registered fine growth and today manages more than 6,000 customer files. An open organisation, Vitis Life approaches current and prospective customers directly and also through a different network in the different countries where the insurer is active.

Overview

country: Luxemburg, Belgium
sector: finance

Profile

Vitis Life specialises in Unit-Linked life insurance and has 50 employees.

Challenge

Vitis Life wanted to combine improved monitoring of the mobile sales team with transparent information sharing in the organisation.

Solution

Already familiar with the Microsoft platform, Vitis Life opted for Microsoft Dynamics CRM – implemented by Nerea.

Benefits

- Possibilities to secure and customise screens in Microsoft Dynamics CRM
- Improved supervision of the activities of sales representatives for management
- Better customer information sharing in the organisation with integration in the back-office system
- Direct access to contracts and accounts thanks to the integration between Microsoft Dynamics CRM and SharePoint
- Business expertise of the IT partner Nerea



Pierre Beelen (Vitis Life)

Pierre Beelen, CFO and COO at Vitis Life: “Our winning asset? Undoubtedly the quality of our service. So to support our consulting activities, we have a team of specialised legal experts in the local legislation of the customer.”

Mobile sales team

The Vitis Life sales team is responsible for canvassing and for relations with the existing customers. An important part of their activity is therefore carried out remotely – whence the importance, according to management, to pay particular attention to knowledge sharing.

Pierre Alexandre Kablitz, Head of IT at Vitis Life: “How can we guarantee that information concerning customers is shared and that we will not lose knowledge about a customer when a sales representative leaves the company, for instance?”

In the past, sales representatives used mainly such applications as Excel and Access, tools that are not very suitable for sharing knowledge...

In 2012, the company decided to seek a CRM solution capable of guaranteeing a better monitoring of canvassing activities, one that makes it possible to trace all contacts with customers better.

The selection process was not long and Microsoft Dynamics CRM was chosen. Pierre Alexandre Kablitz : “As the company was already strongly Microsoft-oriented, the choice of Microsoft Dynamics CRM was obvious. Not only were the users already familiar with the Outlook interface, but the solution moreover offers a high customisation capacity and is easy to implement.”





Pierre Alexandre Kablitz (Vitis Life)



More information about Vitis Life?

www.vitislife.com

Do you wish to receive more information about the products and services of Nerea?

www.nerea.com
contact@nerea.com



Involve users from the outset

Nerea, an authorised Microsoft Dynamics CRM partner, assumed the task of integrating CRM with Microsoft SharePoint. Vitis Life was keen to inform, consult and train future users during the project from the outset: The involvement of the business side during implementation, with personalised guidance and support for each user, has contributed to the success of this project," Pierre Beelen underscored.

Integration with the back-office

Relying on highly appreciated business expertise, Nerea saw through the first implementation phase of Microsoft Dynamics CRM at Vitis Life.

Beyond the mobility of the sales team, it is above all the integration of Microsoft Dynamics CRM with the back-office (a custom application developed in .Net) which provides real added value, as Pierre Beelen explains: "The integration made it possible to relieve the back-office team, as sales representatives can now access by themselves information about customers from their CRM."

Nerea also integrated the SharePoint with Microsoft Dynamics CRM, thereby enabling sales representatives to access important documents (contracts, visit reports, etc.) directly from the customer datasheet in the CRM application.

Securing and customisation

Securing information is a topic that deserves particular attention in the financial sector. Every user thus accesses the CRM through the HTTPS secured network of Vitis Life.

Beyond the security of the network, Pierre Alexandre Kablitz appreciated the security possibilities offered by Microsoft Dynamics CRM for the individual user: "Not everybody can access the same customer data, for instance. Microsoft Dynamics CRM has proved particularly flexible for defining access rights at individual level."

The daily working environment of Microsoft Dynamics CRM for this same customer is nothing other than Outlook – a unique winning asset no other solution can offer, according to Pierre Alexandre Kablitz.

To this must be added the fact that every user can customise his or her own screen, e.g. facilitate frequent searches or even create his or her own dashboard.

Mission accomplished

"Mission accomplished. Microsoft Dynamics CRM has enabled us to reach our objective, i.e. improved monitoring of the sales team with a user-friendly and flexible CRM too," Pierre Beelen concludes.

