



Ageas Insurance

Dynamics 365 Broker CRM platform deployment with data integration, tablet mobilisation and digital marketing

Summary:



Core broker relationship management system



Targeted digital marketing with ClickDimensions



Fully mobile and secure tablet solution



Sophisticated BI exploiting existing mainframe data



Integration with parallel digital projects

“From the moment we first approached Xpedition, they provided us with the best engagement experience at every stage. For instance, an initial Xpedition seminar we attended gave us really useful insights which helped us develop our thinking about how to approach this project.”

Matt Looker, Marketing Manager,
Ageas

The Challenge:

Create new BI and digital marketing capability

One of the largest insurers in the UK, Ageas is part of an international group headquartered in Brussels. Ageas insures millions of motorists and households in the UK with clients applying directly through their website, as a co-owner of Tesco Underwriting, through third party brokers, and in partnership with organisations such as Age UK, John Lewis Financial Services and Vauxhall Motors. Ageas' mission is to make insurance easy and straightforward for customers.

Ageas approached Xpedition as it wanted to replace a bespoke in-house system with a new solution. The objective was to create a platform that was easier and more cost effective to maintain and develop, and could generate the sophisticated business intelligence they needed to manage and grow their business. They needed to measure and continually monitor how much business they were doing through different affiliates, brokers and businesses.

The new solution would need to integrate with a huge amount of critical broker network data held in a bespoke IBM i-Series back office system.

The Opportunity:

Effective integration through collaboration

Xpedition engaged with Ageas in a formal procurement process where we were pitted against larger, big-name consultancies. Ageas were impressed with the questions the Xpedition team asked and the ideas we offered, helping them create a comprehensive project scope.

The project consisted of two phases. Initially, a thorough review of the whole scope helped Ageas rationalise the elements of the work, dividing it between in-house and Xpedition resources. This helped keep costs down and promoted a collaborative approach which suited Ageas culturally.

During the definition phase, Xpedition created a robust plan that covered all the existing and new functionality. In deployment, we prioritised the most key business functions to go live first. The integration aspects of the project were sophisticated, as there were interdependencies with other business critical projects, including a new broker extranet and a major digital marketing campaign.

We delivered a core broker relationship management solution, using existing iSeries data. The solution included ClickDimensions digital marketing, to segment, manage and target brokers with the most relevant and profitable offerings.

Joel Markham, Head of Broker Distribution, Ageas

“The Xpedition bid presentation demonstrated a deeper understanding of our requirements than other consultancies and – very importantly – showed proof of their ability to deliver. They also made a realistic and accurate assessment of the implementation timescale, which was very reassuring. The team was very flexible and worked to our schedule and budget.”



The Solution:

A leading edge platform with bespoke capability

The Xpedition solution provided competitive advantage as it was bespoke. We could configure it to Ageas' needs rather than providing a generic industry solution. This gives Ageas all the benefits of a leading edge, robust platform, but with customised, individual functionality.

With data security also critical for Ageas, the Microsoft Cloud protocols tick all compliance and data boxes. There were some extra challenges in deploying the tablet version of the solution in order to operate securely with internal security systems. Once these were addressed, staff working remotely and in the field could access the system and call on or add to the latest broker insight any time.

Previously, there was no way for Ageas to combine brokers' financial and relationship activity data into a single view. The new solution allows them to overlay all three dimensions, tracking trends and progress, and evaluating the next best actions to grow their business through different brokers. Relationship managers can now prioritise their time to nurture the best potential business. The project was delivered on time and on budget.

The Future:

Granular intelligence for strategic decision-making

Ageas' new CRM solution means they can easily drill down to reveal how different offices of the same broker are performing and which customer offerings are most successful for individual outlets.

Ageas' future strategy relies on them being able to identify the highest value and potential value brokers and channels and develop and nurture those relationships accordingly. They now have that visibility and insight, both as strategic business intelligence, and for day to day relationship management.

“It's unusual for us to use external IT suppliers. Xpedition far exceeded our expectations with their collaborative approach and understanding of our unique requirements. This is one of the most successful externally resourced IT projects we've undertaken in recent years.”

Chris Dobson, Distribution & Development Director, Ageas

About Xpedition

At Xpedition we guide your path to growth, through the implementation of intelligent cloud-based business applications. We help our clients to understand how technology can empower their business in real terms, and we deliver.

Previously known as TouchstoneCRM, we offer so much more than CRM and business software. We deliver real business value through expert consultancy. We're known for our questioning nature and for challenging the status quo.

We succeed when you succeed, inspiring clients with insight led guidance. Our market leading expertise and industry knowledge will help your business to reach its goals.

We understand your industry. Our experts are passionate about sharing their knowledge, revitalising client experiences, improving operational efficiency. At Xpedition, we'll show you the way.

Fast-track your journey to CRM success with Xpedition.

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