



Case Study

Previsul

Insurance



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Business Needs

Founded in Porto Alegre in 1906, Previsul Seguradora has more than 100 years of tradition, with an extensive portfolio of excellence with self insurance products and services.

Previsul is managed by the Caixa Seguros Group, controlled by CNP Assurances, the largest family and individual insurer in France, and Caixa Econômica Federal, corresponding to 100% of the company's shares. With more than 200 employees, the company currently occupies a prominent position in the life insurance market in Brazil.

Known as a solid, experienced and people-focused company, Previsul has been perfecting its business processes in a continuous and structured way. The scope of this new initiative included the mapping and redesign of the prospecting and sales processes. Pre-existing business activities and routines of the company were not fully discarded, serving as a starting point for analysis and improving. It was also part of the scope to define the integrations between the company's legacy systems and the future CRM tool. With revised processes and defined integrations, the implementation of Microsoft Dynamics 365 served the commercial management of Previsul. The main business need was to make the Previsul team of consultants more productive, ensuring greater efficiency and effectiveness in achieving the business objectives mapped with the brokers.

Capturing, centralizing, qualifying and distributing prospects to brokers was one of the challenges as this process was long, non-systemic, and susceptible to failures.

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Interactions between Previsul consultants, brokers and clients needed a single repository, to store the interaction history and the business in progress, as well as to create a 360 degree view of clients and brokers. By managing the business relationship actions in a centrally and organized way, it was possible to activate the broker base that didn't have good results.

Another expectation of the company was to better control the operational processes of policy proposal and negotiation, with a more assertive and centralized forecast of the pipeline and forecast of closing deals. Previsul managers also needed the information graphically and in real time, supporting hierarchical and regional segmentations of the data, making decisions easier and anticipating trends.

Integrate data from legacy systems to power Microsoft Dynamics 365 with relevant information during the prospecting and sales processes.

Os gestores Previsul também precisavam das informações de forma gráfica e em tempo real, suportando segmentações hierárquicas e regionais dos dados, facilitando decisões e antecipando tendências. Integrar dados dos sistemas legados de forma a alimentar o Microsoft Dynamics 365 com informações relevantes durante os processos de prospecção e venda. Find an alternative to carry out the transition of consultants and their respective portfolios in a transparent and organized way without losing activities and actions already planned and carried out.

Solution

In a project that took about four months, AlfaPeople centralized all Microsoft Dynamics 365 registrations, sales histories and activities with potential customers, customers, brokers and financiers. Native capabilities for managing potential clients were put into use, centralizing and systematizing the process of prospecting, qualification and distribution of leads for brokers. Opportunities for new sales and renewals began to be recorded, allowing for a more precise monitoring of the sales process by Previsul consultants to brokers, including when listing and issuing policies. Legacy data systems for brokers, stipulators (customers) and financials were brought into Microsoft Dynamics 365, contributing during the business process and with the historical information needed to process the relationship and classification of customers and brokers.

The broker visiting process began to be automated, using the workflow feature of the tool. Broker commercial results and other process statistics were tracked in real time through the use of Microsoft Dynamics 365 Dashboards. The following Microsoft Dynamics 365 interfaces were also available to Previsul consultants for customer and broker management: Web-Browser, Outlook Client and Mobile App.

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Benefits



“Systemically generating in Microsoft Dynamics 365 the visitation routine and the business indicators of each of the Brokers enhances the work of the Previsul consultants.”

Agility in the process

Greater agility in the process of capturing, qualifying and targeting leads for brokers. Given that the process of acquiring insurance is considered fast, the poor quality in the qualification or the lengthening in the process of destination of the leads significantly diminishes the chances of success of the broker.

Tailor-made guidance and planning

Increased number of Previsul consultants visits to Brokers. Systemically generating in Microsoft Dynamics 365 the visitation routine and the business indicators of each of the Brokers enhances the work of the Previsul consultants by allowing tailor-made guidance and planning during the visit.

Effective pipeline control and sales forecasting.

Having the business pace controlled, knowing which opportunities are the most important, tracking the real-time result of individuals and teams by region, not getting lost in the tangle of follow-ups throughout the business process, having operational efficiency and predictability are some of the strengths of the solution.

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