

R A Insurance Brokers is a first-class insurance protection provider in the UK. R A Insurance Brokers won its customers' trust with its exceptional services and a wide range of insurance options for multiple industries including pharma, motor trade, manufacturing, construction, fleet, and real estate.

PRODUCT:

Sales Creatio, Creatio Webitel call manager cloud

INDUSTRY:

Insurance

REGION:

UK

CHALLENGE:

With every step it takes, **R A Insurance Brokers** puts its customers and their safety above all else. In the quest of continuous improvement of its services and processes, the company wanted to find an effective technology solution to organize customer data better, streamline sales processes, and maximize customer engagement – all to ensure top-notch customer experience.

R A Insurance Brokers' requirements:

- Single IT environment for the company's employees to guarantee workforce alignment
- Omnichannel customer touchpoints for optimized customer engagement
- Transparency in insurance renewals process
- Simple user interface
- Smooth transition from another CRM system

SOLUTION:

Creatio provided R A Insurance Brokers with the following:

- Effective CRM tools to generate business growth
- Out-of-the-box software functionality combined with custom sections to fit industry-specific requirements
- A unified customer database to store and effectively manage leads, opportunities, and insurance agreements
- A tool for insurance renewals process management supported with customer data stored in the system
- A well-organized workplace for insurance brokers in the system with datasets automatically distributed to specific folders
- Effortless data migration from GoldMine
- Custom dashboards with daily and weekly analytics data displayed to track employee performance KPIs
- Omnichannel communications environment for higher workplace productivity
- Cloud-based deployment with regular automatic software updates

BUSINESS OUTCOMES:



97% of timely insurance renewals thanks to action reminders resulting in an increased customer loyalty



Customer portfolio expansion



Sustainable business growth due to well-organized sales operations

Creatio was implemented by Agovo, Creatio's trusted partner in the UK. Creatio's process-driven CRM helped R A Insurance Brokers establish a well-organized insurance renewals management process. The platform's cloud-based sales module enabled the company's employees to effectively handle client interactions and increase sales due to data-driven decisions.