CRM
Case Study

1. Overview

Client Type: Service-Based Enterprise

Industry: Technical Products & Solutions

Business Focus: Sales, service, and distribution of specialized products and equipment

Service Provided: CRM System Design, Development & Implementation

2. Business Challenges

- No centralized customer database
- Missed policy renewal reminders
- Slow complaint resolution time
- Poor tracking of customer interactions
- High customer churn (customers switching insurers)

3. Objectives

- Centralize customer data
- Improve customer service response time
- Increase policy renewal rate
- Track leads, complaints, and follow-ups
- Build long-term customer relationships

4. Solution Delivered

- Customer Master: Centralized customer details, policy information, renewal dates, and claim history.
- Lead Management: Tracks new inquiries, lead sources, and conversion status.
- Complaint Management: Manages service tickets with priority, assignment, and resolution tracking.
- Renewal Management: Sends automated renewal reminders and tracks follow-ups and confirmations.
- Reporting Dashboard: Provides insights on follow-ups, pending complaints, renewal rates, and customer satisfaction.

5. Technologies Used

- Frontend: HTML, CSS, Bootstrap
- Backend: ASP.NET MVC (C#)
- Database: SQL Server
- CRM Features: Role-based access, audit logs

6. Implementation Process

- Requirement analysis with customer service team
- Data migration from Excel to CRM
- User training for executives & managers
- Go-live in phases (Customer → Complaints → Renewals)
- Continuous monitoring & feedback

7. Key Learnings

- Centralized data improves decision-making
- Timely communication builds trust
- CRM helps convert service into revenue
- Data-driven follow-ups reduce customer churn

- AI-based claim prediction
- WhatsApp integration
- Mobile app for agents
- Customer self-service portal

8. Future Enhancements

9. Conclusion

The CRM system helped ABC Insurance retain customers, increase renewals, and improve service efficiency. A well-implemented CRM is not just a software tool, but a customer-focused strategy.