"Fujitsu and Skuid helped us rapidly create a scalable solution to a crucial business problem, without missing deadlines or ramping up costs. This is what digital transformation looks like."

Insurance company representative

Major global insurance company creates 360-degree CRM user experience in 70 percent less time than the traditional method of writing code.

At a glance
Country: USA/Global
Industry: Insurance

Challenge
This large, multinational insurance company wanted to enhance its underwriter and distribution user customer relationship management (CRM) system with a unified user experience (UX) consistent with its best practices and existing workflows.

Solution
Fujitsu, a Fortune 500 information technology equipment and services company, used Skuid to help the insurance company create a 360° view of its clients through an enhanced CRM experience.

Benefit
Underwriters can now quickly leverage intelligence to make informed decisions and more quickly renew policies and create call reports. The system took 70% less time to create when compared with writing code and will reduce overall training and ongoing support costs by up to 35%. In addition, user adoption increased 50%.

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Customer

A global property and casualty insurance company, serving millions of commercial, institutional, and individual customers in more than 80 countries and jurisdictions.

Products and Services

- Salesforce® CRM Platform

Challenge

Users at a major insurance company had trouble navigating the company's CRM because of a cluttered, fragmented user interface. It made basic tasks time consuming and complex ones extremely cumbersome. Users simply stopped using the system, resulting in user abandonment of 70 percent. To reverse this negative trend, the company approached users for honest feedback. Results showed that the underwriters needed highly customized and personalized views of their data, not standard, generic views. By only displaying the specific information users needed, and shown at the right step in the process and in the proper format, they could perform their jobs much more efficiently.

Bad user experience was having a very negative effect on business results. Therefore, the company wanted to quickly fill a significant gap - a lack of dynamic, just-in-time, customer intelligence - by transforming its CRM user experience. The information gap caused by a cumbersome user experience was producing missed cross-sell and upsell opportunities, thereby creating lower-than-expected demand for the company's valuable products and services.

The research also revealed that customizing user experience to the requested levels would have taken developers an estimated three to six months of coding. However, the insurance company needed these customizations to get to market much more quickly, with the added ability to easily make ongoing iterations in an agile way when underwriter needs and processes changed. Writing code would be too slow to meet company revenue objectives, while missed development deadlines would create huge opportunity costs.

"Our underwriters were held back from delivering the results we knew they were capable of, and leadership was seeing this issue manifest at scale," says a representative from the insurance company. "We needed to quickly create a quality solution."

Solution

Users needed a platform to provide a 360° view of their clients, including information from across different business units and product types. They also wanted to be able to quickly and easily create call reports and leverage rich analytics with a new interface catering specifically to their unique business needs.

Fujitsu - a top 10 global partner of Salesforce with more than 400 projects worldwide and more than 300 certified consultants globally - was familiar with what Skuid could offer, and built a proof of concept for the insurance company. Pleased with what it saw, the insurance company commissioned Fujitsu to work with Skuid to enhance the overall CRM experience.

Using the Skuid UX platform, Fujitsu created a comprehensive "underwriting desktop" application to manage all its new business and renewals. Underwriters can now view and drill down into key information about their customers and their policies, as well as log call reports directly in the app.

"Skuid has been very helpful for us," says Vineet Kumar, Solution Architect at Fujitsu America. "It was incredibly simple for us to put together a proof of concept, and then to take that and build a new tool for the company. With Skuid, we have been able to build a great partnership between all three organizations."

Results

Because the partnership between Skuid and Fujitsu combines notable skills from two companies with a proven track record of business application development and delivery, Fujitsu could help the insurance company with its CRM needs in a way never thought possible. In partnership with Skuid, Fujitsu delivered a made-to-order CRM experience at unprecedented speed.

Users can now quickly access the tools and information needed to renew policies and create call reports faster, while intelligence is now being leveraged to generate better cross-sell and upsell opportunities. Overall adoption has been increased by 50 percent, while development time was slashed by 70 percent, and overall costs fell by up to 35 percent.

From a development standpoint, turnaround for updates to the CRM is now much faster, with developers working in an agile fashion, in two-week sprint releases. Because of Skuid's ease-of-use, an administrator with no development knowledge is now able to make changes quickly and easily.

"Fujitsu and Skuid helped us rapidly create a scalable solution to a crucial business problem, without missing deadlines or ramping up costs," the insurance company says. "This is what digital transformation looks like."

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