

## Case study: Implementation of a CRM for Simplinsur

Shortly after its founding, insurance company Simplinsur (SimplAssur in Quebec) entrusted PLANCO with implementing a CRM for its Ontario and Quebec offices. Simplinsur faced many challenges in the quest for peak productivity and top-tier operations. But in PLANCO, it had found the ideal partner: a team of digital transformation experts with in-depth knowledge of the insurance industry.

PLANCO's robust background in insurance helped it quickly identify Simplinsur's needs, the challenges it would face, and the best strategy for a successful transformation. For the smoothest transition possible, it would be vital to get all stakeholders, including investors, on the same page.

### Challenges

When Simplinsur first contacted PLANCO, the company had three major needs. First, a central platform to manage its external referral systems. Secondly, automated processes for communicating with customers and managing claims. These tasks were being performed manually, resulting in frequent duplications. Thirdly, Simplinsur needed the means to measure the effectiveness of its prospecting and sales processes. Its teams were losing precious time to busy work and not operating at their best.

A CRM was the ideal solution for all these challenges. It was PLANCO's job to plan a transformation that would allow its client to keep doing business in the meantime—and fast.

### PLANCO's proposal

The first step in implementing a high-performance CRM for Simplinsur was to perform a detailed analysis of the company's challenges. Using that information, PLANCO developed an action plan to meet its objectives. The goals included:

- Creating software and dataflow architecture
- Implementing a brokerage management system (BMS)

- Implementing underwriting software
- Installing a telephone system
- Training all teams on the new software and phone system
- Establishing performance indicators

Thanks to its strategic vision and proven project management expertise, PLANCO successfully met Simplinsur's goals for its Quebec and Ontario branches. In only five months, the insurance company had achieved a true digital transformation.

## A digital transformation by PLANCO

With the new CRM, Simplinsur's teams have full access to current and prospective customer data, letting its brokers offer personalized insurance packages. The enhanced access to this data has improved both its customer service processes and overall customer satisfaction. Issuing tailored quotes to meet customer needs is a streamlined, efficient process.

Simplinsur can measure individual employee performance to better support its teams, offer further training where necessary, and set realistic goals. Team members feel valued and motivated, increasing overall employee satisfaction.

The integrated CRM is also a substantial time-saver. Automating tasks and synchronizing data has eliminated accidental duplications and cut down on errors. And, of course, the new database is accessible to all employees in each province.

## The pros of a CRM for Simplinsur

Since its implementation, the new CRM has increased the efficiency of Simplinsur's claims process by 80%. Its teams in Quebec and Ontario process more than 24,000 referral requests annually. Time spent on data entry is reduced by 300 hours per year, and data on national performance indicators is 70% easier to collect.

Simplinsur now has the flexibility it needs to expand operations nationwide and take its rightful place in the Canadian insurance market.