



## Customer case IC Verzekeringen

**inetum.**  
realdolmen  
Positive digital flow

### IC Verzekeringen – CI Assurances streamlines its sales with Salesforce cloud CRM

When the sales department of IC Verzekeringen / CI Assurances started to feel limited by the constraints of Excel, the Belgian insurance company decided to switch to a professional CRM solution. It chose Salesforce Financial Services Cloud for Insurance, a cloud CRM platform specifically tailored to the insurance sector. Inetum–Realdolmen assisted IC Verzekeringen / CI Assurances with the implementation.

IC Verzekeringen – CI Assurances has been a specialist in **insurance packages for the not-for-profit sector** for about seventy years. The insurance broker is active in a handful of social profit sectors such as education, care, religion, non-profit and government. IC Verzekeringen – CI Assurances started as the insurance division of the Interdiocesan Center in Brussels, which is still one of the shareholders. Since 2011, the company has been owned by **Ecclesia Group**, Germany's largest insurance broker for social institutions and businesses.

#### A complex, inflexible management tool

**Digitalization is a must** in the insurance sector, as it is in many other industries. That particular challenge rose to the very top of the company's list during the coronavirus pandemic. "Over the past two years, the digitalization process has also really taken off in our company," Liesa Delestinne, Business IT & Digital Innovation Officer at IC Verzekeringen – CI Assurances,

says. "Everyone had to work from home. There was simply no other option in the given circumstances."

This sudden, unforeseen need was also one of the main drivers behind the company's search for a **new central business management system** that was accessible from outside without all the hassle of servers and installations. It needed a **cloud solution** that would also allow employees from the same department and different departments to work together remotely.

The company's need for a new sales solution was the most urgent. For many years, IC Verzekeringen – CI Assurances had been using a program it developed in-house to manage its customers, claims and policies. "The production department used this ERP," Liesa Delestinne explains. "It was completely custom built by our own IT department."



## Complete customer insight

However, that central management solution did not include a CRM tool that enabled salespeople to efficiently manage their customers, prospects, leads and opportunities. "It involved a lot of Excel," Liesa Delestinne recalls. "But all those spreadsheets together didn't automatically result in a clear overview of our customer relationships and sales activities. To give our employees and customers a 360-degree overview, we needed to bring in a professional CRM tool for sales and marketing."

"Our sales team did have an Excel sheet that listed the emerging opportunities," Wouter Goossens, Account Manager at IC Verzekeringen - CI Assurances, adds. "But we didn't have a good overview of our own pipeline or a general overview we could share with other departments. Each department maintained its own data in its own spreadsheet, which wasn't always synchronized with the data of other departments. It wasn't an efficient or convenient way of working."

The same was true for the company's reporting. "Each team handled its own reporting, which didn't always match that of the other teams. The reporting possibilities of our central system were rather limited. If you wanted to retrieve a customer's history to get a more complete picture of that customer, you had to dig around for it manually in the system. This meant that you had to combine different sources and you sometimes even had to look for data in mailboxes or on shared drives."

## Analyzing and streamlining processes

IC Verzekeringen - CI Assurances was looking for an ICT partner that could help select and implement a cloud CRM solution. It chose **Inetum-Realdolmen**. "I felt that its proposal was very comprehensive, very structured and also **very concrete and pragmatic**," Dominique Jacoby, Commercial Director at IC Verzekeringen - CI Assurances, explains. "Inetum-Realdolmen also came across as very professional and instilled confidence in us right away. We had a good feeling about our collaboration right from the start."

That collaboration started with a number of online workshops. "Those workshops mainly focused on our processes," Liesa Delestinne says. "We consulted the key users in the different departments and also discussed

the analyzed processes with our other divisions." When all **essential CRM processes** had been mapped out and thoroughly streamlined, Inetum-Realdolmen also drew up a **roadmap**. This roadmap also included a suggested step-by-step approach rather than a big bang scenario.

Inetum-Realdolmen's initial proposal already included Salesforce's cloud CRM platform as the most suitable solution for IC Verzekeringen - CI Assurances. "We considered a number of other suppliers, but **Salesforce Financial Services Cloud for Insurance** ultimately proved to be the solution whose standard functionality met our insurance company's needs the best," Wouter Goossens clarifies. "This meant that a lot was possible **out of the box** with relatively little programming on our part." The company also chose Salesforce because of its future-proof range. "This means we can continue to benefit from the improvements Salesforce itself makes in the future."

## Together in one system

Meanwhile, Wouter Goossens and his colleagues at the Sales department have already benefited significantly from their use of Salesforce. "Account managers no longer work on their own little island. It is now easier for them to collaborate with each other and with other departments. Working with all our colleagues in one system was like a breath of fresh air."

"We have already achieved our first objective," Dominique Jacoby adds. "Our account managers now have a better insight into what they are doing with a **360-degree view of their customers** and they provide **better reporting to the management**, who can then offer them better follow-up and support." In the next phase, IC Verzekeringen - CI Assurances also plans to roll out **Case Management** in Financial Services Cloud, which will enable the company to monitor and handle customer inquiries even better.

## WANT TO FIND OUT MORE?

About IC Verzekering: [www.icci.insure](http://www.icci.insure)  
About Inetum-Realdolmen: [www.realdolmen.com](http://www.realdolmen.com)