

Customer Success Story

the  team

Unifying CRM for Insurer Excellence

How Astute transformed its
CRM environment to
streamline operations and
enhance client satisfaction


astute

www.first-technology.co.uk



Customer Challenge

Astute is a vital partner for major life insurers, trusted by over 20,000 intermediaries as a single point of entry for client investment and insurance portfolio data. Managing over 25 million transactions monthly across 140+ partners, Astute relies on its sophisticated systems and processes to deliver a seamless, integrated view of the client.

Astute had outgrown its restrictive, multi-tenanted CRM solution. Key challenges included: Limited functionality in SLA, contract, and entitlement management, high costs and risks due to service-level breaches, and increasing regulatory pressures requiring better time management and notification systems. Astute needed a fully integrated cloud solution to address these issues, streamline operations, and reduce penalties.

The Solution

Integrated SLA Management

Recommended Microsoft Dynamics CRM Online for its integrated SLA management capabilities.

Streamlined Digital Environment

The solution unified systems by leveraging Astute's existing Office 365 tools.

Fast and Effective Delivery

Implemented in just three weeks using Agile, the system reduced penalties and boosted compliance.

"Since implementing the solution, we have seen a huge reduction in our clients' unhappiness. This is due to us being able to tell clients, when they contact us, whether we have logged their query and where we are in the process of resolving it."

Zama Ngcobo, team leader
at Astute

The Results

Integrated Environment

Astute now manages its CRM requirements within a fully unified system.

Improved Client Communication

Reduced customer dissatisfaction by providing clear query updates and resolutions.

Regulatory Compliance

Enhanced SLA management reduced penalties and ensured adherence to tighter regulations.