

Revolutionising lead management

How Vitality used Dynamics
365 to drive efficiency and
achieve 87% sales growth

Vitality

**CUSTOMER
SUCCESS STORY**



Customer challenge

Vitality is a UK-based leader in private healthcare and life insurance, serving approximately one million customers. Their mission is to make a tangible difference in people's lives by combining financial services with rewards programmes designed to improve overall wellbeing.

Vitality launched a lead management workflow that initially delivered results. However, as the business grew, inefficiencies emerged. The system became fragmented and slow, creating bottlenecks and delays, with no real-time tracking capability. Manual processes were increasingly relied upon, impacting scalability and competitiveness.

The solution

Vitality selected Microsoft Dynamics 365 as the foundation for a new, modernised lead management system.

The platform's advanced capabilities (including propensity management, machine learning, analytics, and digital web chat support) offered the flexibility and intelligence needed to transform the sales process.

Working in close collaboration, The CRM Team from First Technology Group redesigned and implemented the new system in just six weeks.

The solution was later refined and scaled by Vitality's own team, ensuring long-term adaptability

"A conversation about lead management quickly grew into a vision of a new sales process with functionality we just hadn't even considered."

Keith Boyle | Director of Dedicated Distribution at Vitality

The results

- **87% sales growth:** Year-on-year growth directly linked to the Dynamics 365 implementation.
- **D2C revenue growth:** Direct-to-consumer sales share increased from 3% to 7% of UK turnover, with 10% projected the following year.
- **Lead processing efficiency:** Reduced from one hour to just seconds.
- **Smarter selling:** Improved understanding of customer behaviour through machine learning and analytics.