

Implementation and Customization of Saleslogix CRM application for a leading insurance organization

The Client

The client helps its customers throughout the globe identify, mitigate, and price for risk by providing comprehensive data, leading-edge analytics, and decision-support services. The client's services help customers protect people, property, and financial assets. The client provides statistical, actuarial, and claims data; insurance policy language, fraud-identification tools and risk consulting services. The client also provides rate-quote, underwriting, and policy-management systems for all commercial and personal lines of insurance.

The Challenge

The client had a few hundred sales reps constantly on move and working with their laptops and mobile devices. The sales force needed an efficient and productive CRM solution, which would help the sales force to store the accounts, contacts and opportunities data and also be able to generate the necessary reports.

The Solution

SalesLogix® is the leader in customer relationship management for small to medium-sized businesses that require flexible, easy-to-use solutions that help acquire, retain and develop profitable relationships.

Our team assisted the client in designing and implementing the solution through all phases of the software development lifecycle. This included developing the architectural application design, the software architecture, implementing and deploying the solution. They also helped the client to:

- Determine services and standards which are the corner stones for product customization
- Design projects which will carry the shared services that are required for core product suites
- Design components of the application which will be used for quick assembly into new product specifications

- Coordinate with team to ensure a consistent application architecture is being constructed

The application was deployed in a centralized location and remote offices for connected and disconnected environments. The application was customized for sales and support modules to store customer and sales related data.

Tools and Technologies used

- SalesLogix V6.1.2 (CRM Application)
- Knowledge Sync (Database monitoring and reporting tool)
- VBScript, Cypress enable (Scripting languages)
- Test partner (Testing tool)
- Windows 2000 Server (Server Operating System)
- Windows XP (Client Operating System)
- SQL Server 2000 (Database)
- Crystal Reports (Reporting)
- Remote clients connect using VPN