



CASE STUDY

# Helvetia optimizes digital assistance services for customers and intermediaries with Microsoft Dynamics 365

## Business situation

Helvetia is the third largest Swiss insurance group and has been present in Italy since 1948. For over 70 years, the company has been operating in the market with professionalism and competency, creating products aimed at satisfying customer needs.

In recent years, the company has further strengthened its market position by consolidating its distribution network and making important acquisitions. The Helvetia Italia Group is among the best players in the insurance market, operating with a range of DANNI and VITA products for both families and companies.

Helvetia's main goals included:

- Managing customer and intermediary requests through differentiated service models based on specific attributes
- Ensuring omnichannel management of various traditional and digital touchpoints
- Providing end-to-end governance and monitoring of assistance processes, guaranteeing they can effectively adapt to changes in regulatory and business context

## Solution

The Helvetia Italy Group chose the approach proposed by Avanade which created a simplified and advanced digital assistance service, thanks to the Microsoft Dynamics 365 tool in the cloud. For both customers and intermediaries, the solution

aims to improve the service offered as well as the timeliness and quality of the response provided. It set the following objectives:

- Provide a contact center platform for the company that can manage customers and intermediaries, enabling a client-centric vision of the business
- Consolidate current touchpoints and activate new ones for an omnichannel approach that guarantees continuous support to the distribution network and helps consolidate the relationship with the end customer
- Simplify engagement operational methods, improve communications between various levels and ensure timely and relevant responses
- Customize service by channel type
- Align the architectural design of the contact center with the company's IT strategy
- Integrate existing systems with Dynamics 365 providing operators with a single internal consultation tool
- Allow performance monitoring in various areas to promptly identify improvement actions

Using the information assets created for the entire company, Avanade implemented several customized modules within the program to manage and streamline customer and intermediary support processes.

“The Contact Center is the image of the service that an insurance company wants to offer its customers and distributors. Having developed a project of excellence allows Helvetia to uphold its reputation for quality service.”

**Roberto Lecciso**

Chief Operating Officer, Helvetia Swiss Insurance Company

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### Results

Helvetia is reaping major benefits from adopting the new Microsoft Dynamics 365 ecosystem and Avanade's proposed transformation program. Thanks to the simplification and centralization of information, the company has significantly increased internal management efficiency. The new platform provides different business areas with a single point of access to information and a single tool, guaranteeing a reactive and measurable response to satisfy multiple customer requests.

The assistance service created is also easy to use, thanks to the numerous guided and standardized processes available. The solution implemented by Avanade has brought numerous benefits in the company's relationships with its customers. The digital transformation of customer care allows Helvetia to promptly manage customer requests while continually monitoring activities.

The cloud solution has also made it possible to minimize time to market and costs, thereby increasing the management autonomy of the contact center.

### About Avanade

Avanade is the leading provider of innovative digital and cloud services, business solutions and design-led experiences on the Microsoft ecosystem. Our professionals bring bold, fresh thinking combined with technology, business and industry expertise to help make a human impact on our clients, their customers and their employees. We are the power behind the Accenture Microsoft Business Group, helping companies to engage customers, empower employees, optimize operations and transform products, leveraging the Microsoft platform. Avanade has 39,000 professionals in 25 countries, bringing clients our best thinking through a collaborative culture that honors diversity and reflects the communities in which we operate. Majority owned by Accenture, Avanade was founded in 2000 by Accenture LLP and Microsoft Corporation. Learn more at [www.avanade.com](http://www.avanade.com)

### About Helvetia Italia Group

Helvetia is the third largest Swiss insurance group, present in Italy since 1948 with its own direct representation. For over 70 years it has been operating in the market with professionalism and competence, creating products aimed at customer satisfaction. In recent years, the company has further strengthened its position in the reference market through the consolidation of the distribution network and important acquisitions. The Helvetia Italia Group ranks among the best players in the insurance market, operating with a range of DANNI and VITA products, aimed at both families and companies.

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