



CASE STUDY

Zurich gives customers greater confidence and security with cloud services

One of the largest Microsoft Dynamics 365 Customer Engagement projects in financial services leads to better customer care

Zürich Versicherungs-Gesellschaft AG, commonly known as Zurich, is Switzerland's largest insurance company. It provides individuals, small businesses and mid-sized and large companies in Switzerland with a wide range of property, casualty and life insurance products. But insurance is more than just a business; it's a service based on trust. To enable more effective business processes to communicate with existing and potential new customers, Zurich needed more adaptable, future-ready tools.

Business situation

Legacy CRM reaches its limits

For years, Zurich had plans to move its customer relationship management (CRM) to the cloud. Its legacy on-premises solution was highly customized and ran on a hosted service, making any changes and upgrades costly. While its legacy system satisfied the company's need for lead management and tracking the customer journey, it had reached its limits for growth and effectiveness. Zurich wanted a modern CRM platform with new features and innovative tools to better understand and respond faster to its customers. Otherwise, the insurer would have to keep customizing and changing its systems to adapt to evolving needs and expectations. To stay ahead and keep its technology from becoming obsolete, Zurich was ready to move to the cloud.

Solution

Migration to Microsoft Dynamics 365 and Microsoft Azure

Supporting its goal of becoming a technology pioneer in the insurance market, Microsoft Dynamics 365 and Microsoft Azure were the company's products of choice for a new CRM. Given our expertise with cloud migrations, Avanade was called to help Zurich plan and execute a successful cloud journey, supporting a complete technology design, project management and risk management support. Avanade Advisory worked side-by-side with Zurich to develop the prototypes, set up new IT infrastructure and then move up to 4,000 users to the cloud. This implementation became one of the largest Dynamics 365 Customer Engagement projects in the financial services industry and laid the foundation for Zurich's improved customer management system.

Results

Modern tools enhance insurance processes

The new Dynamics 365 and Azure cloud components will support Zurich's business processes so it can continue expanding its customer base and support additional business units. Enhanced customer, policy and complaints management will allow Zurich to identify new opportunities for customer care. More specifically, cloud is unlocking value and enabling new growth through:

- Flexible and efficient lead management
- Mobile service capabilities with secure, anytime, anywhere access
- New integrated features, such as marketing and omnichannel capabilities

With access to Power Apps, Zurich can now rapidly build low-code apps that increase business agility and allow the company to continually modernize its insurance processes. Ultimately, better service delivery translates to greater confidence and security in Zurich's ability to help customers protect the people and things they love.

About Zurich

Zurich: A strong Brand in Switzerland. More than 1.4 million customers in Switzerland place their trust in the products and services of Zurich. Every day, private individuals, small- and medium-sized enterprises as well as major corporations and institutions choose the security of our insurance, pension and investment products.



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

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