

One of the Spanish leading insurance companies empowers its agents with mobile CRM tool

About Grupo Catalana Occidente

Catalana Occidente is one of Spain's largest insurance groups, with over 4 million customers and more than 20,000 agents. This major holding group comprises of several subsidiaries: Seguros Catalana Occidente, Seguros Bilbao, Plus Ultra Seguros, Atradius, Atradius Re, Crédito y Caución, NorteHispana, Catoc, Vida, Cosalud, and other complementary entities.

Having a broad product portfolio and a growing number of agents, Catalana Occidente decided to look for a technology solution that would hold all business information, has the possibility of integration with other business tools (such as SharePoint and Outlook) and the data would be available for their insurance agents from anywhere via mobile devices. They chose Microsoft Dynamics CRM with Resco Mobile CRM. The solutions were customized to the needs of Grupo Catalana Occidente and implemented by Microsoft and Resco partner Prodware Spain SA.

Customer

Grupo Catalana Occidente
www.grupocatalanaoccidente.com

Solution

Resco Mobile CRM for Microsoft Dynamics CRM 2011. Upgrading soon to Dynamics CRM 2013/2015

Industry

Insurance

Organization Size

6,500+ employees

Country

Spain

Partner

Prodware Spain SA
www.prodware.es

Business Challenge

Microsoft Dynamics CRM 2011 is the heart of Catalana Occidente's business operations with more than 4,500 users. It holds almost 30 million records; throughout the year they are working with more than 1.2 million active business records, 600,000 open business opportunities and many new activities that are created every day.

The insurance group has an extensive external commercial network of agents, visiting customers every day. As the CRM is the source for all the relevant business and customer data for the agents working on the go, they needed a tool for accessing this data and at the same time updating the data from their mobile devices.

Catalana Occidente's requirements for the mobile tool included:

- **Offline functionality.** *"The main objective was the possibility to work in offline mode to allow agents to work without having internet connection,"* says Jordi Ribes Preckler, Business Processes Development Manager at Grupo Catalana Occidente.
- **Responsiveness and ease-of-use** for all commercial agents to work quickly and comfortably
- **Simple scalability** of the application that saves development time
- Easy management of **business and administrative tasks** that are required for the work of mobile salesforce
- Works on **major mobile operating systems** as the agents utilize various mobile devices

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Jordi Ribes Preckler

Business Processes Development
Manager at Grupo Catalana
Occidente

Solution

It was a clear choice for Grupo Catalana Occidente as Resco Mobile CRM met all the required criteria. The solution was tailored and implemented with the help of Microsoft and Resco partner Prodware Spain. Currently about 200 sales agents (and rising) use the Resco Mobile CRM application to have up-to-date information from Microsoft Dynamics CRM from any mobile device. The solution was published in the repository of mobile applications so that all Catalana Occidente's agents of the external commercial network are able to download the application for their convenience.

Two versions of one application. Grupo Catalana Occidente created two main customizations of the Resco Mobile CRM application:

"In one customization we added dynamic links that offer additional business information with a simple access for the user. In the second customization of the application, we have

implemented more complexity for safer maintenance of user credentials—the user is forced to revalidate the credentials every time when synchronizing the application,” Jordi Torres Gonfaus explains.

Besides, the agents make use of new personalized entities in their Resco Mobile CRM application.

“For example, we created a new entity to manage contracts with custom entity relationships. In this case we wouldn't use the standard entity because they have many relationships with others entities (products, invoices...) that we don't use. Also we created a new entity to manage commercial teams and reduced some functionalities to make an easy experience for the users.”

“The sales agents use Resco Mobile CRM for their customer visits, especially the calendar consisting of Dynamics CRM activities as well as opportunities.”

Jordi Ribes Preckler

Business Processes Development
Manager at Grupo Catalana
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Benefits

Increased mobility and productivity. With the new mobile CRM tool from Resco, agents are able to have a complete control of their business opportunities — update status, add notes, manage all related tasks and activities with a few clicks in the mobile application. This fast access to sales data and background information helps them in consulting the insurance contracts with their clients in real time.

“The sales agents use it for their customer visits, especially the calendar consisting of Dynamics CRM activities as well as opportunities,” Jordi Ribes Preckler states.

User-friendly experience and responsiveness. For Grupo Catalana Occidente, the responsiveness of the application was one of the main objectives when looking for mobile CRM. Its design for tablets was ideal in 3 areas:

“It minimizes the use of keyboard; maximizes the use of resources embedded such as photo camera, GPS, touch-optimized interface; and there's no need for zoom as its clearly designed pages are easy to read,” Jordi Ribes Preckler adds.

Furthermore, the mobile CRM tool is accessible on any mobile device, so the sales agents can use a variety of different smartphones and tablets running on both, iOS and Android.

Professional team. By providing a comprehensive mobile application that can integrate CRM functions into a mobile device, the insurance agents gained a competitive advantage as well as it increased their image of professional salesmen when visiting customers.

Quick responses to business demands. For the management team, including Jordi Torres Gonfaus, the best features are definitely the offline feature, easy customizations from Dynamics CRM's

administration panel and the good customer service from Resco's support:

"We needed an extra functionality in the calendar that would allow us to show opportunities with its beginning date. Resco support helped us achieve this functionality in the online and offline mode."

Apart from that, Resco keeps adding new design concepts and functionalities into the solution in a rapid speed:

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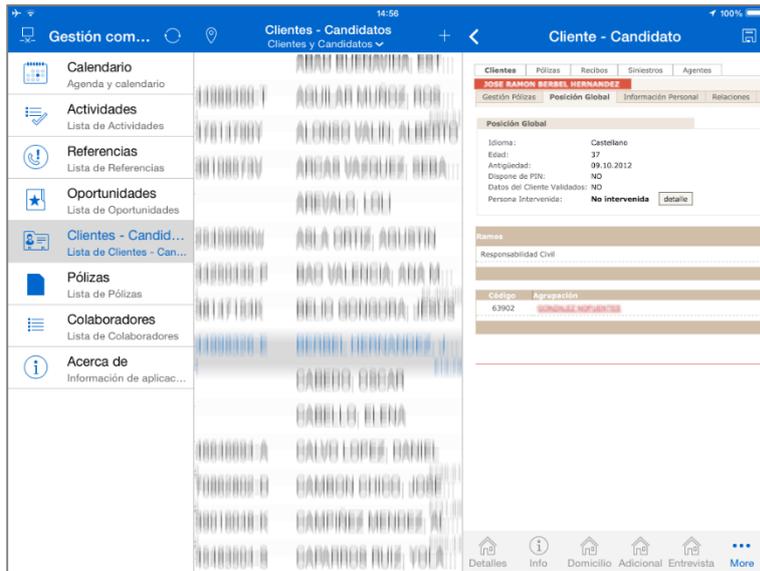
resco.net

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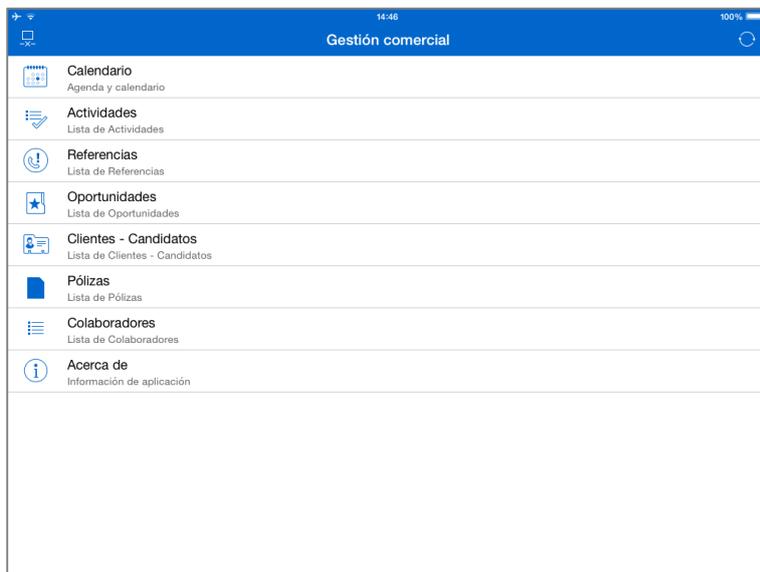
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Resco Mobile CRM

www.resco.net/MobileCRM

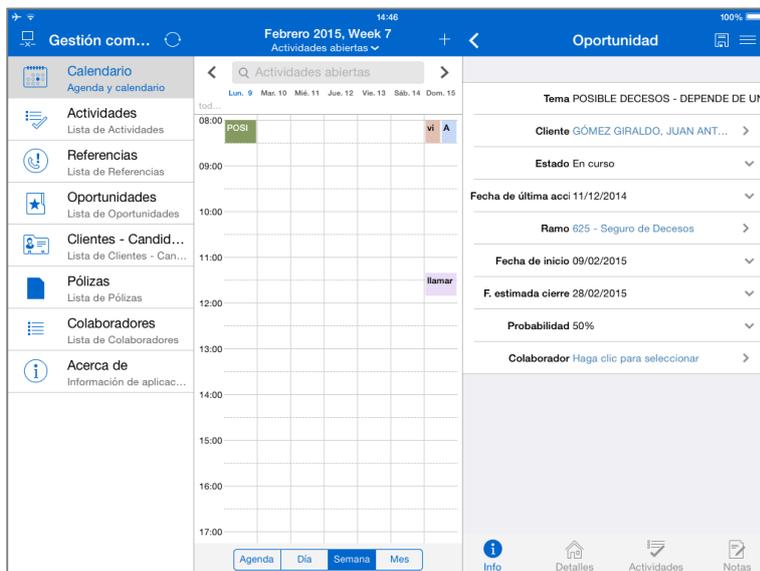
Screenshots



The users can access specific info from the company's intranet



Main screen of Grupo Catalana Occidente's Resco Mobile CRM application



Opportunities are visible in the calendar, for example opportunity "POSIBLE" and its details