



Get further, together

In today's market, insurance companies want to ensure they are leveraging the power of the most advanced CRM technology available.



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We help you deliver a better customer experience, optimise performance and impact the bottom line from a tool you already have in-house.

A background image showing a person's hands writing in a notebook with a pen. The person is wearing a blue shirt. The image is partially obscured by text boxes.

Salesforce Optimisation Services

**Insurance
industry**

5 Insurance Imperatives

- Dynamic omni-channel
- Personalised service-at-scale
- Collaborative engagement
- Actionable insights
- Culture of Innovation & Agility

Our Services

- Sales operations capability assessments
- CRM sales technology assessment
- CRM-for-sales digital solution implementation
- CRM sales technology optimisation for existing implementations,



Salesforce Pardot

Reach consumers at scale with personalised messages based on behavioral triggers, such as when a returning website visitor downloads a guide to buying a life insurance policy, marketers can automatically follow up with a “thank you” email and nurture these relationships

Smarter B2B Marketing Automation



sales cloud

Sales Cloud

Insurance reps and agents have the tools to deliver more personalised communications across any device, collaborate in online social feeds, streamline service requests, track new opportunities, and more.

Smarter Sales Services

Proven success

We have extensive experience working on successful insurance CRM projects. With well-known companies such as:

- Grupo PSN
- Policy Expert
- Fidelis Insurance

Our engineering team has over 15 years of experience delivering digital solutions and technology frameworks, including CRM



GRUPO



Getting further, together with PSN - the mutual insurance company for university professionals.



Their ultimate goal was to place the customer at the heart of every process and therefore make the shift from product-centricity to customer-centricity.



Unifying data in one single digital platform, made it possible for employees to understand the current status of policies, the actions required to renew them, the history of commercial actions and incidents related to a customer, as well as their policies, payouts, financial activity, and so on.



In turn, all of this information is available in the data analysis platform and can be used to understand the commercial behaviour of customers, the different segmentation groups, the potential for churn and other indicators such as NPS, RFM and CLV.

