

CASE STUDY

RLI CORPORATION Multi-Line Insurance

"Our implementation was a phenomenal team effort. The Alithya team spent a great deal of time with us and helped us define our outcomes by understanding our goals. They absolutely added value by working with us to whittle down our ideas to the top priority items. By the end of development, we were able to achieve not only what we had agreed to, but much more with ownership of the solution."

Haley Miller, Product Marketing Coordinator



Headquartered in Peoria, IL, **RLI** is a specialty property and casualty insurance and surety bond company. With operations in all 50 states

from locations around the country and over 50 years of expertise, RLI is focused on finding innovative ways to solve the challenges their customers face.

RLI has four distinct surety segments – Commercial Surety, Contract Surety, Energy Surety, and Miscellaneous Surety. They are each staffed with specialists that have the expertise to underwrite the bond, industry, and financial risks specific to the segment.

A 360 Degree View

Fundamentally, RLI wanted to be able to give their team in the field more information about their agencies so they had a 360 degree view of their relationship. In the day-to-day life of their sales team, they needed the ability to efficiently route to agencies, prepare for meetings, capture feedback, and then disseminate the information.

Key Benefits

- > Ability to leverage Microsoft platform
- > Gained additional information about agencies and relationship with them
- > Automation of processes
- > Access to hidden data with consistency across Surety division
- > Access to competitor intel

With Microsoft Dynamics 365, they now have the ability to do all of that, improving account and relationship management – in one tool.

In addition, RLI has been able to provide their sales team with automated processes that free up their time. A main business challenge RLI was facing was data access. The data lived in various places, so there was a lack of consistency with the data presented. With sales people on the road and in the field, getting information to the home office about market changes or particular changes within an agency was not an efficient process.

Business Outcomes

A key reason that RLI decided to invest in Dynamics 365 was due to Alithya's approach to business outcomes. The teams spent a lot of time together working to understand and verbalize RLI's goals, including:

- > Increase number of quality meetings generating new business
- > Decrease Field Sales prep time
- > Improve data consistency
- > Grow share of wallet and brand loyalty
- > Increase ability to view and act on market trends

In addition to these predefined business outcomes, RLI has found additional positive outcomes since the implementation that include keeping track of prospects, the ability to record previously un-noted territory splits, and a view into competitor intel.

Partnership with Alithya

Not only was Alithya recommended due to their experience in the insurance industry, but they also came in with a process that showed RLI how they could successfully implement and own their CRM.

As the RLI team bought into the platform, understood efficiencies, and wanted to leverage it as much as possible, the partnership between the two companies has led to an investment that has made the RLI team's lives better.

According to Haley Miller, Product Marketing Coordinator at RLI, "We have a true partnership with Alithya and can see that they are more than just a CRM partner."

Alithya's business outcomes approach, CORE (customer owned rapid engagement) methodology, and High Performing Organization model, are valuable pieces to RLI's success during and after the implementation. Another key factor in RLI's success was their understanding of how critical their solution ownership was, which allowed the Alithya team to bring about the desired results. Miller noted that, "The Alithya team was always able to find the best solutions without custom development. They were great and very accessible during the whole development process. Any issues we've had, have been addressed while keeping within our timeframe and estimate. They were very willing to teach and provide great tools to learn how to own the solution at the end of the day. We now love the product, and our field is out there loving it!"

Much Needed Upgrade

In deciding to upgrade from an old version of Dynamics CRM on prem and many spreadsheets, RLI completed an evaluation of Salesforce versus Dynamics 365 and chose Dynamics 365 based on the demo they received from the Alithya team. Not only was Dynamics 365 shown to be more cost efficient, but also the Alithya team was also able to show exactly how RLI could go about their business day-to-day.

As an existing Microsoft shop, RLI also wanted to be able to leverage the platform. They found that Dynamics 365 integrated into their security profiles and systems and their corporate Windows product line. There is now a tight integration with their existing Adobe Marketing and O365 solutions, in addition to providing the ability to use Power BI.

"ALITHYA'S CORE PRINCIPLES KEPT OUR PROJECT ON TIME AND ON BUDGET WITH A FOCUS ON DEFINED BUSINESS OUTCOMES. EVEN WITH A SHORTENED DEADLINE, ALITHYA'S TEAM ENSURED WE ADOPTED THE SOLUTION AND WERE GIVEN THE TOOLS TO MANAGE IT."

- Haley Miller

FULLSCOPE BECAME PART OF THE ALITHYA GROUP IN NOVEMBER OF 2018. Alithya is a leading strategy and digital technology company with over 2,000 highly skilled professionals delivering solutions across Canada, the US and Europe. Alithya's Microsoft practice covers a wide array of capabilities including Dynamics, Azure, business analytics, digital solutions, advanced analytics, application development and architecture. Focused on business outcomes, our combined companies have delivered Microsoft ERP, CRM, BI and digital solutions to over 1,200 clients. Alithya's global offering is to deliver strategy and digital technology services.

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