

HITACHI
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HAI Group



 **Hitachi Solutions**



Dynamics CRM Customer Story

Public and Affordable Housing Solutions Provider Builds Better Customer Relations with Microsoft Dynamics CRM

CUSTOMER PROFILE

HAI Group serves the public and affordable housing community with special, niche insurance programs as well as other value-added products and services. The Company's continued growth over the past 25 years and diversification into areas where members have identified needs, demonstrates the Company's commitment to their more than 1,400 stakeholders. HAI Group is dedicated to providing reliable insurance, training, and software solutions in a manner which exceeds expectations. As a Member-owned organization, HAI Group has positioned itself as a recognized leader and expert in the public and affordable housing industry.

INDUSTRY

Insurance and Related Services

LOCATION

United States

HAI Group is a family of companies founded by and dedicated to serving the public and affordable housing community. They deliver innovative, tailor-made solutions to protect assets, improve efficiency, empower employees, and move housing strategies forward. Over the last 25 years, HAI Group has shown impressive dedication to its more than 1,400 stakeholders as it has grown and diversified into areas where Members have identified needs. Their portfolio includes insurance, software, capital, research, advocacy, and learning solutions. As a Member-owned organization, HAI Group has positioned itself as a recognized leader and expert in the public and affordable housing industry. Headquartered in Cheshire, Connecticut, HAI Group's Membership extends across the United States.

Microsoft Dynamics CRM has contributed to the success of HAI Group over the past couple of years as it has already expanded into five different groups within the organization

CHALLENGE

HAI Group is dedicated to improving its application infrastructure, moving away from complex custom coding to a more configurable, easy to use support solution. This custom coding approach is very expensive to maintain resulting in an environment of multiple disparate systems and applications that do not easily integrate with one another. As a result, work processes have proven inefficient. The inefficiencies lead to many manual workarounds which plays a direct effect upon employee morale as people are working harder rather than smarter. In keeping with the demands of the environment and growing customer needs, CRM offers a smarter solution. One example of "manual" is how and where HAI Group shares data internally. Due to silos of information, there is no single, consolidated sales view. HAI Group's unique business model services a number of groups within the organization, which makes a centralized account management system necessary to ensure customers have a single point of contact for both sales and support queries.



“We are looking for CRM to be a database system tool that our people can rely on. Whether in sales, marketing, underwriting, or account services; our CRM should provide a deeper insight of our Members and customers. Our goal is to make the data easily accessible and consistent, and CRM is the tool that is going to help us deliver.”

Carmela Avery, Operations Manager, HAI Group

“Dynamics CRM has uncovered the efficiencies in our processes,” said Anthony Peccerillo, CTO at HAI Group. “Over the last 5 years our business has evolved substantially and we found ourselves with a disjointed account management and sales process. CRM gives us a common platform that enables us to service our customers holistically by managing the complexities involved with aggregating or customer information across business lines. Ultimately it provides the means to focus on servicing the needs of our customers.”

The transition to Microsoft Dynamics CRM architecture was HAI Group’s first foray into moving onto a standardized platform to make things more efficient, to streamline the operations, and to have a consolidated view of customers.

“We’re enabling our Customers to take advantage of our entire suite of products and services by providing a single point of contact, a Customer Success Manager who intimately understands their needs and can leverage the information in CRM to enhance their experience,” Peccerillo said. “Unrivaled service defines us and CRM is an enabler for delivering it.”

SOLUTION

HAI Group and Hitachi Solutions partnered to create a configurable, customizable Microsoft Dynamics CRM application to suit an enterprise business. As HAI Group continues to grow, it requires a transparent system that provides information that spans departments.

“Hitachi Solutions came with experience in insurance,” Peccerillo said. “So we weren’t teaching. We didn’t have to do a lot of education on our business to get going with the project. That was big.”

HAI Group currently uses Microsoft Dynamics CRM for an array of tasks, including account and contact management, lead and opportunity management, dynamic marketing lists, and pipeline consolidation. Additionally, HAI Group utilizes a number of industry-specific functionality such as business intelligence, insured meetings, broker meetings, sales type meetings, and conferences.



“HAI Group is a family of companies dedicated to making a difference in the subsidized housing environment. The first step in making a difference is knowing our Member and customer needs. How better to do this than by sharing information across the Enterprise.”

Carmela Avery, Operations Manager, HAI Group

HAI Group’s journey with Hitachi Solutions to leverage Microsoft Dynamics CRM is more than just an implementation. By consistently working with the system and conducting internal trainings, HAI Group is able to maximize its investment in Microsoft Dynamics CRM and leverage the application to stretch across departments.

“We are in the midst of a transformation, moving to a matrix type structure. How best to lead the organization than by example, delivering application solutions that create an environment of information sharing and transparency,” said Carmela Avery, Operations Manager at HAI Group.

One group inside HAI Group using Microsoft Dynamics CRM is the Risk Control and Consulting Department. The Risk Control and Consulting Department is utilizing Dynamics CRM for day-to-day management of their customer facing RAMP application. RAMP, the Risk Action Management Program, is a dynamic set of questions that when combined with the ability to upload and download documents, makes it easier for associates to see the status of a customer’s application and any outstanding tasks or communications with the customer. Microsoft Dynamics CRM is the essential management console for their process and is indispensable to the operation.

HAI Group’s Insurance Operations is using Dynamics CRM for their inbound insurance policy department, internal processes, and as the basis (through Opportunities) for all renewals. This helps in the migration from the legacy policy system to the new policy system by being the data exchange layer to bridge the gap between the two.

All of the information captured using Dynamics CRM as a front end is integrated with various legacy ERP systems within HAI Group using a variety of tools including SSIS.

Microsoft Dynamics CRM provides a standardized architecture both for HAI Group’s currently supported departments as well as on an enterprise basis.





WHY HITACHI SOLUTIONS?

Hitachi Solutions is one of the largest, most qualified and highly experienced Microsoft Dynamics consulting firms across the globe, capable of handling complex tier-one displacement projects. Our company's caliber of expertise and commitment to customers is evidenced through our consistent recognition from both Microsoft and industry analysts. Contact a Hitachi Solutions expert to discuss how our Microsoft Dynamics Solutions can help improve your productivity.

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"Dynamics is a great fit as a framework. It allows us to easily build reusable workflows and entities for managing a variety of processes across the business; bringing us closer as an enterprise," said Jonathan Green, Enterprise Architect at HAI Group.

BENEFITS

Robust Marketing Tool

HAI Group will soon utilize ClickDimensions integrated with Microsoft Dynamics CRM for lead management, opportunities, and campaigning. Adding new marketing functionality, along with building out KPIs for performance, will give HAI Group a competitive edge in the market and provide increased visibility across departments.

Consolidated Sales View

Microsoft Dynamics CRM provides HAI Group a consolidated pipeline of its products, which enables business leaders to make more informed sales projections. With consistent sales stages across the company, HAI Group is able to have a single view of sales statistics.

Additionally, Dynamics CRM users can view all customer interactions within the system, whether they interacted with sales staff, an account manager, or support.

Continuous Support

HAI Group's initial investment in Microsoft Dynamics CRM began with the Hitachi Solution Lab. The Solution Lab provided HAI Group a preliminary plan for adopting Microsoft Dynamics CRM to maximize ROI. Both management and IT teams met with Hitachi Solutions to define high-level goals for the company and Microsoft Dynamics CRM. By taking advantage of this opportunity to become comfortable with Dynamics CRM and learn more about how it could help decrease silos of information, HAI Group is able to continuously find new ways to increase ROI by using functionality available in Microsoft Dynamics CRM.

