

# Texas Farm Bureau Insurance Case Study





## Microsoft Dynamics 365 Customer Story

*Insurance Provider Connects Operations, Improves Customer Service with Microsoft Dynamics 365 for Sales*

### CUSTOMER PROFILE

Texas Farm Bureau Insurance provides service for the auto, property, life, and health insurance needs of Texas Farm Bureau Insurance policyholders. The company serves customers and their families and is headquartered in Waco, Texas.

### INDUSTRY

Insurance

### LOCATION

Texas, United States

Since 1952, Texas Farm Bureau Insurance has been protecting its customers' moments – the big, the small, and the everyday. The Texas Farm Bureau Insurance Companies' mission is to help customers manage the financial risks of everyday life and successfully recover from any insured loss through prompt, professional, and personal service.

### CHALLENGE

As Texas Farm Bureau Insurance continues to grow, it needed a scalable CRM system to efficiently manage its policyholders. The company currently serves hundreds of thousands of customers and their families, and is comprised of more than 750 multi-line agents and 300 claims personnel who provide instant service at over 300 offices statewide.

In order to continue to provide excellent customer service to its policyholders, Texas Farm Bureau Insurance needed a place to store customer and prospect data in a centralized location that can be accessed by the right people in the organization. Prior to Hitachi Solutions and Microsoft Dynamics 365 for Sales, Texas Farm Bureau Insurance was a heavily paper-based organization. The move to Dynamics 365 for Sales enabled agents to log and store key customer information in an accessible location, rather than taking notes in notepads and storing paper files.





Dynamics 365 for Sales provides a consistent communication standard across all of Texas Farm Bureau Insurance’s entities. In the past, it would have been difficult for different teams to share information. Now, when a policyholder calls in, anybody who answers the phone – whether that is an agent, a secretary, or a policy services individual – can access and document their information in Dynamics 365 for Sales to provide consistent customer service.

### **SOLUTION**

Texas Farm Bureau Insurance uses Dynamics 365 for Sales to manage its sales processes. Dynamics 365 for Sales provides a unified, central repository of policyholder data that can be easily accessed by the right people within the organization, at any time. This serves Texas Farm Bureau Insurance’s county staff, agents, and even larger policyholder database by providing agents with insights that personalize relationships and predict policyholder needs.

Dynamics 365 for Sales provides agents with a way to mine the data for their book of business to look for additional coverage opportunities they can offer to their policyholders.

What was previously difficult and cumbersome is now a quick and effective process with Dynamics 365 for Sales. Texas Farm Bureau Insurance now enjoys a robust customer management system that provides a wealth of information in an easy to use interface. An agent can quickly find whatever customer information is needed to foster lasting customer relationships and improve retention.

Hitachi Solutions has maintained a close relationship with Texas Farm Bureau Insurance throughout its CRM journey. The two teams worked together to implement Texas Farm Bureau Insurance’s vision to continue to grow as a policyholder-oriented operation while supporting both operational objectives and policyholder growth goals.





## WHY HITACHI SOLUTIONS?

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## BENEFITS

### Quick and Easy Access to Policyholder Data

Dynamics 365 for Sales provides a single source of customer information that enables consistency across Texas Farm Bureau Insurance's lines of business. Agents can quickly access information such as policyholder data, past histories, and retention notes to provide the same quality standard of customer care, whether they are in the office or in the field.

### Streamlined Operations Throughout the Organization

Texas Farm Bureau Insurance has been able to use Dynamics 365 for Sales as a tool to promote corporate initiatives to its agents in the field. Activity lists and follow up reminders keep important initiatives top-of-mind for agents. For example, retention efforts can be provided to specific agents who can follow up with policyholders that may be at risk of leaving. A list of targeted activities is then generated and the agent can connect with that policyholder to encourage retention.

### Improved Cross Communication

When any Texas Farm Bureau Insurance representative speaks with a policyholder or prospective policyholder, they can easily document that communication within Dynamics 365 for Sales. The next time that a policyholder calls, the person they speak with will have access to their entire customer contact record, including all past communication with Texas Farm Bureau Insurance.