



## Implementing CRM

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### Please briefly describe the initiative.

Implementation of a Customer Relationship Management (CRM) system

### What were the benefits?

A CRM application can provide numerous benefits to an insurance company, improving both customer experience and operational efficiency. Here are some key benefits:

- **Improved Customer Experience**
- **Personalized Service**  
CRM systems allow insurance companies to maintain detailed customer profiles, helping agents offer more tailored advice, quotes, and policy recommendations.
- **Faster Response Times**  
CRM software helps with more organized responses to customer requests.
- **Customer Retention**  
By using data from CRM, we can anticipate customer needs (like policy renewals).
- **Increased Sales**  
Cross-Selling and Up-Selling: By maintaining detailed records on each customer's needs and preferences, we can easily identify opportunities for cross-selling or up-selling policies.  
  
Sales Forecasting CRM tools provide insights into sales trends and potential future opportunities, helping us plan their sales strategies better.

### Who were the main stakeholders involved?

The sales teams in the head office



## **What were the major learnings and challenges you had to overcome?**

Resistance to change and user adoption

On the first day, employees resisted adopting the CRM system due to familiarity with old and standard processes.

The first few days clients refused to send the request through CRM-Odoo System.

## **Going forward, what are your plans to further develop the project?**

We have planned to extend the implementation on branches of Intersig.

*Are you interested in exchanging with Greta? Please feel free to contact her!*

### **Greta Cici**

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