

GLOBAL INSURANCE COMPANY
Uses Targeted Insights to Stay Customer Savvy

This global insurance company provides risk management and insurance services to B2B customers — along with the research, engineering, and technical know-how to avoid loss in the first place. Started more than 100 years ago, this U.S.-based company now has over 5,000 employees working with clients in nearly 150 countries, which makes them one of the world's largest commercial property insurance firms.



RESULTS USING INSIDEVIEW

Keeps client-side teams in-the-know on customers' business information, industry trends, and personnel movements so they can proactively address shifting needs and fresh opportunities

Gives sales teams direct conduits to the right executive contacts, plus the insights and media alerts to make relevant pitches, which saves times and increases engagement

Integrates with existing Microsoft Dynamics CRM system to put business and contact information, social media updates, and news alerts directly into the tools already used by their teams

“*InsideView helps us stay on top of key business events at our clients so we can reach out in a preemptive manner rather than being reactionary after a change occurs. We look at InsideView as a way for us to **increase our ‘client savvy,’** so we always know what’s going on with their businesses, their worlds, and their industries.*”
 — Digital Solutions Specialist

CUSTOMER CHALLENGES

- Needed a pipeline of insights and information to fill gaps in prospect and customer business data and place the intelligence directly into their internal systems
- Expand internal knowledge of every client’s business to eliminate reactionary responses and increase proactive calls when business events opened new opportunities
- Wanted more accurate and current information on accounts to avoid information gaps or time wasted chasing bad or irrelevant leads

InsideView Keeps Teams on Top of Every Customer’s Business

This global commercial insurance firm prides themselves on knowing what’s going on with their customers. It takes a lot of research but it helps them help their customers avoid unnecessary risk. InsideView gives them news and events, scours social media, and keeps contact changes up-to-date so teams don’t have to waste time on web searches, nor do they ever look unprepared or uninformed in front of clients. It’s what they call ‘client savvy,’ and it’s a key differentiator in how they serve their customers. It’s also key to helping them **maintain their client retention rate of 95 percent!**

InsideView’s Data and Intelligence Gives Sales Teams an Inside Track for New Business

When sales teams go after new opportunities, there’s obvious value in knowing the key decision-makers and finding paths to their doors. Insurance firms target those in financial and risk management roles, but specific titles can vary widely across clients. InsideView gives them the latest intelligence on executives so they can quickly

identify who’s writing the checks and who’s making the decisions. InsideView alerts and watch lists keep them aware of leadership shifts or breaking news so there’s never a missed opportunity or time wasted on dead-end leads. And since every executive favors a warm referral, they take advantage of InsideView’s ability to highlight hidden connections through contact lists and social media networks.

InsideView Puts the Client Data they Need Directly into the Tools they Already Use

Always looking to increase both efficiency and productivity, this firm’s process improvement group identified a need for better client intelligence. But to truly move the needle on efficiency, they noted, it had to be integrated with their existing Microsoft Dynamics CRM system. InsideView’s native integration, along with a stellar sales and service experience and market-leading intelligence, made it an easy choice. With better client information at their fingertips, requiring no change in how they work, InsideView helped the entire client-facing side of their business look more savvy than ever before.

Provides risk management, insurance, and engineering services

OVER 5,000
GLOBAL EMPLOYEES

INSIDEVIEW
CUSTOMER
SINCE 2016

HEADQUARTERED IN THE UNITED STATES AND SERVING CUSTOMERS IN NEARLY
150 COUNTRIES

Listed on the **FORTUNE 1000** and as one of **Forbes’ America’s Best Employers**