

On the Federated Insurance side, the tool is primarily aimed at the sales team because they directly communicate with our customers.

A great tool that fits Federated Insurance needs

We asked Mary-Anne what made Sales Desk such a great fit for Federated Insurance. "The tool is much simpler and more user friendly than what we were using before – the old system was so complicated that a lot of our representatives preferred using a pen and paper!" explained Mary-Anne. "Now all they have to do is complete four mandatory fields, and their prospect is protected."

Here are a few more reasons the launch of Sales Desk is such great news according to Mary-Anne:

- Federated Insurance's customer-facing teams will be able to access information from their BlackBerry. When they do, they can search for a customer's name and access everything they need to know about the account. If it is their account, they can edit from the field. If the account does not exist in Sales Desk, the sales representative can create the entry from their mobile device. The exception to this is premium-specific information – that's not available in order to protect account privacy between representatives.
- Sales Desk offers Risk Services Coordinators an efficient reporting system to produce their weekly reports. With the tool, it'll take five minutes to put a report together – with the old system, it could take 45 minutes to an hour to do the same thing!
- The program allows us to customize our database so that it fits the needs of the different classes of business and customer segments we insure. For example, as we focus on growing in the small business segment, we can modify how much information we collect about our small business customer, which is much less than what we would need for a larger, more complex account.
- The tool allows users to search for data alphabetically, by area, or by parent company.

Ensuring the successful launch of Sales Desk

Launching Sales Desk required an important time commitment from the team. "We encountered a few hiccups on the way and we've done a lot of work on migration. I spent the month of March going through over 2,000 records to ensure that they all had a differentiation in order to eliminate duplicate accounts," explained Mary-Anne. "The work involved in cleaning up the old data involved many members and a lot of time – six members in Winnipeg alone!"

What's next for the project? "We launched Sales Desk around June 16th so we'll be shutting down the old system 90 days after that," said Mary-Anne. "That way, employees will still be able to use it as a lookup tool but won't be able to put anything into it."

Training for new employees on how to use Sales Desk will be on-going and job aids will be available for them on LearningLink.

The IT, Federated Insurance Sales & Sales Training, Learning & Development, and EPMO teams did an amazing job working on this project. Sales Desk will go a long way towards making the lives of our Federated Insurance Sales Representatives much easier.