



CLIENT SOLUTION CASE STUDY

## Brotherhood Mutual Strengthens Sales Effectiveness with Microsoft Dynamics 365 Sales Solution

MICROSOFT DYNAMICS 365

**Customer:** Brotherhood Mutual Insurance Company

**Industry:** Insurance

**Headquarters:** Fort Wayne, Indiana

**System:** Microsoft Dynamics 365 Sales

**CHALLENGE:** Brotherhood Mutual needed to replace its aging, one-dimensional legacy CRM solution with a modern, multi-dimensional system which could handle multiple department functions and increase outbound sales effectiveness.

**SOLUTION:** Brotherhood Mutual selected Microsoft Dynamics 365 Sales—a modern, cloud-based solution, to better support six internal business units and enhance the sales process with their independent agents.

### **BENEFITS:**

- Completed project on-time, under budget in just four months
- Integrated with policy, claims and premium data from legacy insurance system
- Flexible, intuitive system allows for customized screens for six different business units
- Increased sales effectiveness and pipeline management for independent agents
- 800,000+ records imported from legacy CRM system without a single error
- Multi-dimensional CRM data views available through Power BI
- Utilizing Power Automate for data integration

### **CLIENT OVERVIEW**



Brotherhood Mutual has been insuring churches and related ministries for more than 100 years. Brotherhood Mutual works with thousands of Christian churches and related ministries, schools, camps, and colleges across 47 states. Through its affiliate, MinistryWorks®, Brotherhood Mutual provides payroll for churches and related ministries.

In the past, Brotherhood was utilizing a legacy CRM solution that could no longer keep pace with the needs of its sales and marketing team. The IT group considered several solutions, but an early front-runner was Microsoft Dynamics 365 Sales.

## A Strong Partnership

After a false start with another vendor, Velosio was brought in to implement the solution, with a tight timeframe for go-live. “Although we didn’t initially have a tight timeline, we received a ‘Dear John’ letter from the incumbent CRM vendor letting us know that they were going out of business, so we needed to get the project done in four months, which seemed unfeasible,” explains Johnson. “Velosio understood this timeline and accepted the challenge,” continues Johnson. Brotherhood clicked with Velosio from the start. “We were confident with Velosio because we felt like they were small enough that we mattered to them, but large enough to have the necessary resources to complete this project within our unrealistic timeframe,” says Johnson. “We knew we wouldn’t just be a number on a project board,” says Johnson. “We thrive on good business relationships, and we felt as if we could talk candidly to the group. From our first meeting with Velosio on, we knew they were the right partner for us,” continues Johnson.

## 4-month Fast Track Implementation

On the requirements list, Brotherhood wanted to extend its CRM solution, which was previously focused on internal functionality only, to incorporate its outbound sales process managed by independent agents, integrate associated policies, and create and track a pipeline methodology. Brotherhood also wanted to bring in weekly data feeds from its legacy policy management system via Scribe Jobs, (dubbed Tuesday files), to incorporate customer, claims and premium data.

“The Velosio team was comprised of 5-7 of the smartest, best people I’ve ever worked with,” says Johnson. “They took pride and ownership in their work and viewed our success as their success.” To keep up with the velocity of the project, timing was critical for both the Velosio and Brotherhood teams. “It was a bit like trying to keep pace with a five-headed monster,” says Johnson. “Sometimes a requirements document was sent to us on a Thursday, and we had to turn it around by Friday so the Velosio team could work on solutions over the weekend,” continues Johnson.

Brotherhood now has 11 business units using Dynamics – all with customized screens and required security models backed by a common data set. “During the initial project, our CRM Team of two worked with each business unit to be sure their voice was heard and coordinated activities with Velosio to deliver our comprehensive project,” says Johnson. Because of concerted efforts on the part of both Velosio and Brotherhood, Brotherhood was live in record time—within four months and under budget.

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- Judd Johnson

*Manager, Enterprise Data management*

## Business Benefits

After go-live, Brotherhood utilizes Power BI allowing users to consume CRM data. “We can create these reports quickly, something that didn’t exist before. Our users consume data like never before. Data is now available, visible and more meaningful by using Power BI,” says Johnson.

Since the initial implementation, Brotherhood continues to build customized functionality for the business. They also take full advantage of Microsoft’s PowerApps suite of products – Power BI, Power Apps and Power Automate.

11 business units now have valuable data at their fingertips. “The Marketing team has a different view of the data than our Ministry Works group; both teams feel as if the system is tailored just for them,” says Johnson.

## Customer Support

After going live over four years ago, Brotherhood has become mostly self-sufficient on the system, but utilizes Velosio customer support for big projects. “We look to Velosio for their expertise and continue to have a good working relationship with the customer support team,” says Johnson. “Velosio knows our system, and I’m always confident that our issues will be addressed,” continues Johnson. Brotherhood mainly relies on customer support for synching issues between browsers after an update has installed, to run ideas by the support team, or, for example, to build out functionality to attribute leads or new customer referrals to influencers.

Next up for the system, Brotherhood is investigating Click Dimensions for Marketing, integrated with Microsoft Dynamics 365, and will integrate its cloud-based phone system into Microsoft Dynamics 365 so that when a call comes in, the associated CRM record will pull up to enable sales or support to immediately begin typing for added efficiency.

**“Our IT team leaned towards a Microsoft solution as we are a Microsoft shop. Clearly, if we wanted to have a fully functional system that integrated with all our Microsoft infrastructure, it needed to be Microsoft Dynamics.”**

- Judd Johnson

*Manager, Enterprise  
Data management*

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