



GREAT WEST GROWTH

# Great West Growth

**POWEROBJECTS**  
We leverage technology to solve business problems

## Great West Growth Improves Efficiency with Microsoft Dynamics CRM and PowerObjects

### Business Challenge

Great West Growth is a leader in the life settlement and life insurance financing industry. With an experienced management team that has successfully financed over \$2 billion in assets, Great West Growth's internal IT systems were not suited to keep up with this expansion. In addition, system performance degradation, the inability to obtain drill down reports, lack of data dashboards, and deficient data mining capabilities were hindering further business growth.

Management was looking for a comprehensive solution to handle all of the company's internal data needs including tracking of: policies, insured, medical data, brokers, and agents. The goal was to have the ability to relate all the data in a unified method so users can easily data mine and extract reports.

### Solution

Great West Growth knew that in this very unique market and an out-of-the-box software package did not exist to meet their needs. PowerObjects, a Microsoft Gold Certified Partner, was selected to implement Microsoft Dynamics CRM 3.0, a comprehensive customer relationship management system, delivered as a complete hosted solution. PowerObjects was selected because of its experience in designing custom software solutions and the cost advantage in developing part of the system in its offshore facility in Asia. The hosted solution was also very attractive to Great West Growth because it does not require additional hardware and internal IT staff resources. Microsoft Dynamics CRM 3.0 provided a great development platform for all data needs and relationships. In addition, Microsoft SQL Server reports were created to provide graphical representation of the current operational trends and to precisely report on regulatory needs.

The CRM solution also solved the issue of excess paper handling and tracking. When a policy is submitted for underwriting, there are up to 10 items of supporting documentation that must be received with each policy. Documents such as copies of the policy, medical records, and various verifications needed to be easily tracked and maintained with each record. Most of the documentation is received via email or paperless/scanned faxes. With the Microsoft Dynamics CRM solution, the receipt and tracking of the supporting documentation was easily built into a checklist in a tab and then an automated workflow was initiated with escalation rules for reminders that documents are due yet not received. Copies of the documents could now be saved on line with the CRM record, thereby insuring a complete paperless file of all necessary documents.

### Benefits

Microsoft Dynamics CRM 3.0 was customized to handle the unique internal requirements of the viatical data for Great West Growth. Unlike the traditional CRM systems where Accounts and Contacts are always the top focus, Microsoft Dynamics CRM 3.0 was customized to precisely fit Great West Growth's business needs. Other productivity increases have also been achieved by automating routine tasks with workflows and automatic generation of documents.



### Accolades

“The ability to store copies of documents for a customer and policy in one record in one system has been extremely helpful – we no longer need to go to multiple databases or files to see what documents we have and which ones we still need”

See for yourself how PowerObjects can help you simplify your business.

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