



“We saw early in the process that Anexinet could build almost anything we wanted in Microsoft CRM... Anexinet effectively implemented a Microsoft Dynamics CRM solution in 3 months that enabled us to achieve our objectives...”

**— Mark Alberto, VP of IT
The Graham Company**

Anexinet Helps Top Insurance Broker Improve Sales Performance with Microsoft® Dynamics CRM Solution

The Challenge

The Graham Company, a top insurance broker, places annual premiums in excess of \$250,000,000, yet its sales force represents only 10% of its 175-person workforce. Despite having a 75% success ratio on new business opportunities (the industry average is 15%), Graham did not have enough opportunities in its pipeline. Nor did they have an effective, efficient way to track opportunities and the activities associated with them. The company relied on manual, time-consuming processes to create prospect interaction histories and tracking reports, and there was no easy way for sales teams to share information, or for its marketing team to match events with the appropriate target audience. Without a central repository to capture, track and share prospecting data, the company was losing track of potential sales opportunities.

The Solution

After working with The Graham Company to complete a thorough evaluation of current infrastructure, business challenges and organizational objectives, Anexinet recommended Microsoft Dynamics CRM as the best application platform for molding a unique solution to fit their needs. Microsoft CRM would enable end users to continue using MS Office applications as their main electronic workplace, and IT to leverage its existing Windows Server 2003 and SQL Server infrastructure and skill sets.

Anexinet configured Microsoft CRM to better manage prospect opportunities throughout the sales process. This provided the means by which prospects could be “scored” and categorized based on key criteria to target sales efforts on the most qualified opportunities, and marketing initiatives on individual client profiles. The solution automates business rules so users can see immediate feedback when changing key data elements within a client profile.

Solution development began with a Proof of Concept created by Anexinet at one of its Near-Site Development Centers™. This enabled The Graham Company to evaluate the solution as it was built without interrupting daily business operations. It also provided a means for the company to “try before buy” prior to investing in software licenses for all end users.

The Benefits

The Anexinet solution delivers more accurate sales forecasting and allows The Graham Company to track thousands of potential new business opportunities. With a central repository in place for easy access to client and prospect information, the company has been moving forward with solution enhancements, such as dashboards with KPIs and performance tracking of individual sales teams.



The Graham Company is one of the top insurance brokers in the United States. As a privately held trusted advisor, the company offers a full array of property, casualty, and surety coverage to high-risk businesses. The Graham Company exceeds its clients' expectations by offering highly customized solutions for their insurance needs.



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