

CRM Vendor Selection for a Mid-Sized Insurance Provider



CASE STUDY

When a mid-sized insurance company sought to modernize its CRM platform, they turned to us not just for advice—but for clarity. With legacy systems limiting growth and engagement, the client was ready to move to a SaaS-based CRM. But with a crowded vendor landscape, licensing complexity, and significant implementation decisions ahead, they needed a partner who could cut through the noise.

APPROACH

Our role was not to make decisions for them, but to empower them with the insight to make the right ones. We brought:

- Objective guidance built on extensive experience with CRM selection and implementation.
- A vendor-agnostic stance—our recommendations are not incentive-based.
- A process tailored to the client’s internal capacity, culture, and capabilities.
- A focus on practical answers: What does it really take to implement this? How do we manage risk and avoid costly missteps?

HOW LABUR RESPONDED

Our team engaged early and stayed active throughout:

- Deep CRM expertise: We advised on CRM capabilities, technical differentiators, and common pitfalls in digital transformation—especially in transitioning from legacy to SaaS models.
- Architectural and contractual evaluation: We assessed licensing and contract terms for both the technology platform and the implementation partner, highlighting industry norms and risks.
- A proactive voice in the room: We didn’t just sit at the table—we engaged, challenged assumptions, and led conversations that helped the client stay in control of the process.

RESULTS



Avoided over-licensing: We identified modules quoted by the vendor that wouldn’t be needed for years—saving significant upfront license costs.



Eliminated unnecessary tech: Architectural discussions led us to cut ancillary technology the SI had proposed—redirecting investment to more strategic areas.



Negotiated better terms: We coached the client on how to secure more favorable contractual terms.



Shifted to a hybrid implementation model: With strong internal talent, we helped the client move from a vendor-led model to a hybrid team, reducing reliance on outside resources.

Interested in LABUR’s advisory services, strategic resourcing, or executive search offerings?



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