

# A Landmark Dynamics 365 Contact Center Implementation in Canada: Leading Insurance Broker's Customer Service Transformation, Powered by Alletec

D365 Customer Service | Contact Center

## Business Overview:

Founded in 1927, the client is a **Canadian-owned, independent insurance broker** headquartered in Cambridge, Ontario. With over 500 employees across multiple Ontario locations, the organisation's Personal Lines division focuses on home, auto, life, travel, pet health, and specialty insurance. As an independent broker, it partners with multiple insurers to secure optimal coverage and pricing for individuals and families, while delivering expert advice and a strong client-first service model.

## Customer Service Imperatives

The client's Personal Lines division manages high volumes of customer interactions across voice and email. Over time, customer service operations spanned multiple platforms, including Salesforce, Anywhere365, and HubSpot, that functioned as separate systems rather than a unified platform. This limited visibility into the end-to-end customer journey and made it difficult to manage interactions consistently and efficiently.

Maintaining multiple platforms increased licensing and support costs, automation was limited, and essential capabilities such as call recordings and transcripts required additional tools to meet compliance and quality requirements. System instability further strained operations through recurring outages and performance issues.

Receptionists searched EPIC (**Broker management software**) for every inbound call to identify the correct service representative, shared mailbox emails were distributed manually, SLA reporting was time-consuming and unreliable, and account managers did not have an integrated way to complete the service/sales questionnaire. The questionnaire template was managed outside of EPIC. Together, these challenges slowed agents, reduced productivity, and impacted the consistency of customer service.



## Alletec's Frontier Firm Transformation (Agentic AI-Led)

The client partnered with Alletec to re-architect its Personal Lines customer service operations through a digital optimization strategy centred on Dynamics 365 Contact Center and Dynamics 365 Customer Service, designed as an agentic, AI-driven engagement platform rather than a traditional contact centre replacement. The initiative was positioned as a comprehensive replacement for the existing Anywhere365 and HubSpot environment, consolidating customer engagement into a single, unified Microsoft platform.

### Microsoft alignment

Leveraged client's existing Microsoft technology alignment to reduce change management complexity and accelerate adoption.

### End-to-end delivery

Alletec guided the client through solution architecture, business process redesign, and change management while ensuring alignment with Canadian compliance requirements.

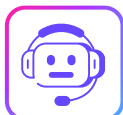
## Solution Highlights



**Real-time EPIC integration:** Enables AI to surface customer context at the moment of engagement



**Intelligent call routing:** AI identifies concierge and private clients and dynamically routes calls to the right teams



**Agent-guided interactions:** AI assists agents with contextual insights, recommended actions, and next-best steps during live calls



**Autonomous email handling:** AI automatically classifies, routes, assigns, and attaches emails to EPIC with minimal human intervention



**AI-powered call recordings and transcripts:** Automatically linked to customer records for compliance and quality assurance



**Automated SLA monitoring:** AI continuously tracks, measures, and reports SLAs without manual effort



**Embedded AI intelligence:** Sentiment analysis, real-time language translation, predictive analytics, and workflow automation



**Low-friction operations:** Simplified queue management and after-hours configurations managed through intelligent rules

## Impact and Results

The implementation transformed the client's contact centre from a tool-driven environment into an AI-assisted, agentic operating model. Agents work from a single, unified interface that minimizes manual effort and context switching, enabling faster, more responsive interactions. Receptionists can instantly identify callers, including concierge and private clients, and route them to the right service teams using EPIC-sourced insights presented at the first point of contact.



- ✓ **Automated email workflows:** Incoming shared mailbox emails are automatically assigned and attached to EPIC with updated data fields.
- ✓ **Reliable SLA reporting:** Manual SLA reporting was replaced with automated, accurate reporting.
- ✓ **AI-enabled customer insights:** Sentiment analysis, intelligent insights, and automation vastly improved customer experience and internal decision-making.
- ✓ **Expanded value beyond scope:** Additional high-value features were identified during implementation, increasing overall impact.
- ✓ **Reduced complexity and instability:** The unified Microsoft platform eliminated the previous multi-system environment's instability.
- ✓ **Smooth transition to live operations:** Go-live was seamless and largely unnoticed by customers. One of the client's executives described the Go-live as one of the smoothest he has ever seen!
- ✓ **Landmark Canadian deployment:** This project represents one of Canada's early deployments of Dynamics 365 Contact Center, positioning the organisation as an early adopter of Microsoft's next-generation customer service technology.
- ✓ **Delivered on time and on budget:** The solution now serves as the foundation for the client's long-term digital roadmap.



## Customer Perspective

From an executive standpoint, the organisation sought to improve customer service, enable agents with the right contextual information, enhance reporting accuracy, and align with its broader Microsoft-first strategy. Integration with EPIC was a critical requirement, enabling a consolidated view of client interactions across voice, email, and system records.

The client selected Alletec based on a long-standing, successful partnership that began with Dynamics Business Central implementation. Alletec's ability to listen, adapt, and address challenges throughout the project was highlighted as a key strength, along with deep CRM expertise and strong collaboration between IT and business teams.

Key operational gains cited by the client include improved receptionist workflows, streamlined email processing, accurate SLA measurement, enhanced reporting, and superior call recordings and transcripts. For customers, the go-live experience was seamless, with faster routing and more proactive engagement from service teams.

***"We set out to enhance customer service through intelligence and context—equipping agents with real-time insights and reporting accuracy, via our Microsoft focused approach. With Alletec's strategic partnership and support, we now have a unified view of client interactions across voice, email, and our Broker Management System (EPIC)—enabling faster case resolutions, improved service rep productivity, streamlined operations, and an enhanced service providing a more seamless experience for our customers."***

— Vice President of Information Technology

## Looking Ahead

The organisation plans to continue expanding its coverage of the Dynamics suite, with Dynamics 365 Contact Center becoming the standard call centre solution across the organization. Future initiatives may include Customer Insights-Journeys, additional Dynamics applications, and the development of insurance-specific solutions built on the Microsoft platform.



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