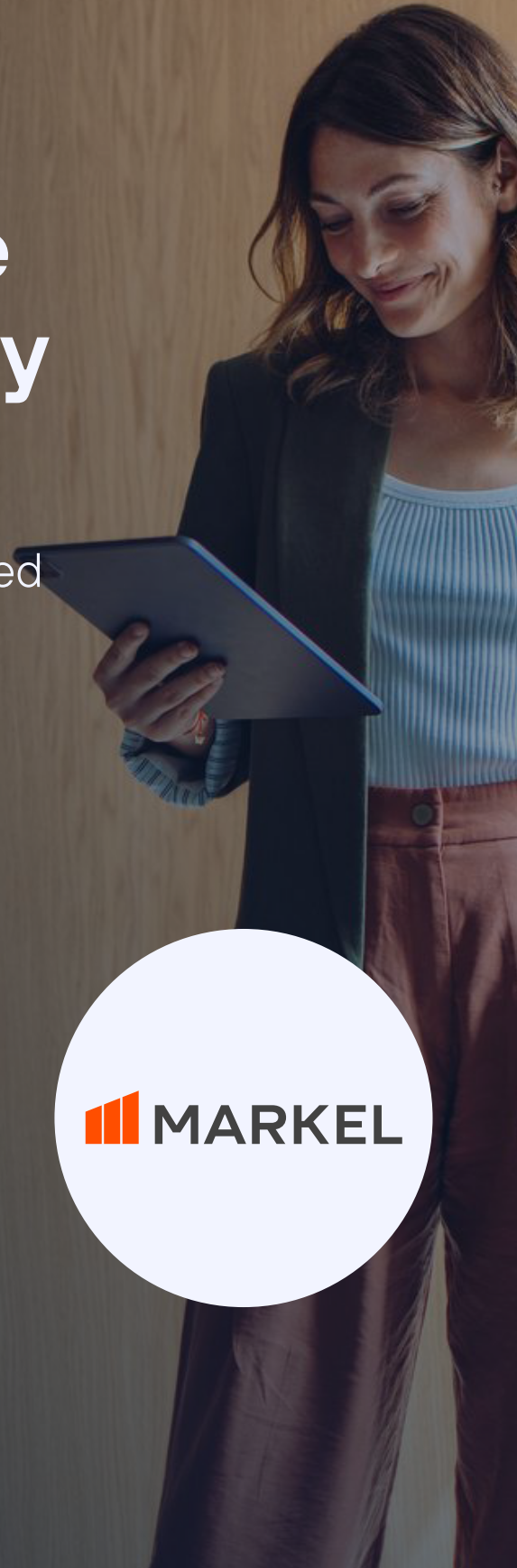




Markel

# Transforming Customer Service in Global Specialty Insurance

How global insurer Markel modernised  
Helpdesk Operations with Telefónica  
Tech and Microsoft Dynamics 365





## Intelligent Insurance Solutions

**Markel Group Inc.** combines a broad range of capabilities and expertise to provide intelligent insurance solutions around the globe. With over 5,000 employees, Markel caters for even the most complex insurance needs of major businesses, SMEs, professionals, and sole traders, focusing on fostering long-term partnerships with colleagues, brokers, and clients. Putting people first is what sets Markel apart, as the company is committed to and guided by the enduring principles of the Markel Style.



Our helpdesk system had served us for nearly 20 years, but it was no longer fit for purpose. Partnering with Telefónica Tech gave us the opportunity to completely refresh how we work on the Markel advice lines. Their support helped us modernise, integrate, and build a scalable, future-ready service solution that truly meets the needs of our team and customers. From the outset, Telefónica Tech took the time to listen and to understand our vision, which made working with their team a frictionless, enjoyable experience.

- Beverley Bates – Advice Services Director

## CUSTOMER CHALLENGES & DRIVERS

### The need for a refreshed approach

Markel was using a legacy helpdesk system that was no longer fit for purpose. As well as being difficult to maintain, the existing system lacked integration with key components required by Markel, such as CRM and policy administration systems.

Additionally, it did not support Single Sign-On (SSO), limiting user access efficiency. With the existing system approaching end of life, meaning it would no longer be supported or updated, Markel sought to support ongoing digital transformation and to eliminate technical debt. First and foremost, managing 750 calls per day—and up to 2,500 per day during the Covid pandemic—Markel was in need of a refreshed, unified helpdesk solution that could improve colleague and customer experience, replacing several systems to provide consistency and efficiency.

To execute, Markel required a long-term, strategic Microsoft partner to support both the immediate project and future initiatives.



## OUR SOLUTION

### Establishing a customer-centric partnership

Markel sought functionality first, assessing several platforms including the latest version of the legacy system. This led them to Microsoft solutions due to breadth of functionality and scope for expansion.

Telefónica Tech brings proven experience as a Microsoft Inner Circle Partner, ensuring a cost-effective and timely delivery. Having worked with Telefónica Tech in the past to replace legacy sales apps, Markel engaged them as their partner of choice to bring their customer service vision to life.

Markel's partnership with Telefónica Tech is built on shared values of integrity, honesty, and a customer-centric approach, aligning closely with the customer's expectations.

Following a Discovery phase including a comprehensive gap analysis, in collaboration with Microsoft, Telefónica Tech proposed **Dynamics 365** Customer Service as a functional replacement and modernisation of Markel's helpdesk tool.

Dynamics 365 offered the breadth and depth of functionality required, including powerful reporting capabilities, and fit well with Markel's overall IT strategy.

The new platform replicates existing functionality—ensuring minimal disruption to processes—while incorporating modern features and enabling low-code development opportunities.

### **360-degree view of the customer**

Leveraging Dynamics 365 and Power Platform, Telefónica Tech implemented a full Case Management solution for Markel, including integration with key systems such as Business Hub, Cisco, Calabrio, and multiple policy systems to equip agents with a frictionless, 360-degree view of the customer.

The project also included migration of 7 years' historical data, enabling a seamless transition. Additionally, the new solution integrates seamlessly with Outlook, allowing customer service agents to create cases directly from emails and cutting down on manual effort.

As well as configuration, implementation and migration, Telefónica Tech delivered training, comprehensive testing, and post-go-live support. Importantly, the entire project was delivered with no disruption to customer service.

### **Business Impact and Agility**

Dynamics 365 dashboards have allowed Markel to track cases and responses per team and per advisor, keeping managers informed on team productivity.

Markel can now report on the type of advice being given, allowing them to track trends and outliers, and plan ahead throughout the business. For example, visibility into spikes in queries such as Redundancies enables proactive engagement from the claims team. With this rich, self-serve functionality, Markel is equipped to configure internally, facilitating faster responses to changes and making the business more agile.

Overall, the Dynamics 365 Customer Service solution Telefónica Tech delivered for Markel is positively transforming the insurance provider, in a phased approach to ensure quick time to value and maximum impact.



From an IT perspective, we welcomed the move away from our legacy system which had become outdated. Telefónica Tech helped us transition to a scalable, configurable solution built on Microsoft Dynamics 365. We'd seen Dynamics' power through our existing Sales platform and knew it could support the business's operational vision. As a result, our new helpdesk solution from Telefónica Tech isn't just fit for purpose, it's aligned with how Markel wants to work into the future and opens up a whole new toolset of capabilities.

- John Langmaid – IT Manager



## OUTCOME

### As a result of the Dynamics 365 Customer Service solution, Markel has:

- ✓ **Safeguarded longevity and security:** Reduced risk with modern security and access features in a fully supported, continuously improved cloud environment.
- ✓ **Improved efficiency:** Call handlers, administrators, and managers can work faster with a single view of the customer.
- ✓ **Insights and analysis:** Better resource planning with real-time visibility into workloads, and service improvements due to trend analysis abilities and simplified, secure report distribution.
- ✓ **Bolstered the Markel Commitment:** More easily tracking customer SLAs and fulfilling Markel's commitment to call back within the hour.
- ✓ **Transforming colleague and customer experience:** Markel is equipped with a modern, scalable and flexible Customer Service platform for the future.

Going forward, Telefónica Tech is developing telephony integration for Markel's Dynamics 365 solution that will continue to transform customer experience, while new insights from Dynamics 365 are facilitating Markel to develop a business efficiency plan.

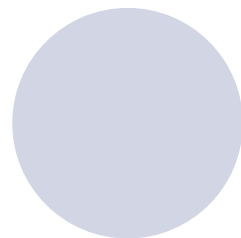
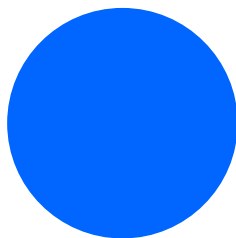
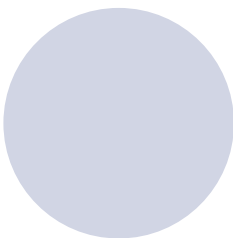
## TECHNOLOGIES USED



Dynamics 365  
Customer Service



Power Automate





# Leading the Way in *Digital Transformation* for our Customers

Telefónica Tech unlocks the power of integrated technology, bringing together a unique combination of the best people, with the best tech and the best platforms, supported by a dynamic partner ecosystem to make a real difference to every business, every day.