

Case Study

Reich Insurance

Dynamics 365 Tenant Migration,
Support Services, & Canvas App



Company and Project Introduction

Established in 1943, Reich Insurance provides wide ranging insurance for both businesses and private clients, in the UK and around the world. Currently a top 10 independent UK broker, Reich impartially advises on all types of insurance, including home, motor, healthcare, business, construction and property.

As a top UK independent chartered broker, Reich have over 130 experts managing annual premiums of nearly £110m. With specialist and market access, Reich can offer truly impartial advice and ensure customers receive the right product for their needs, at a competitive price, year after year.

Reich Insurance approached Strategy 365 with the aim of migrating their Dynamics 365 environment from an old Microsoft 365 tenant to a new tenant. As they were lacking a support partner, Strategy 365 proposed Dynamics 365 & Power Platform support services to Reich Insurance and referred an official Microsoft Dynamics 365 training partner to train their staff.

Website: <https://www.reichinsurance.co.uk>



130⁺ Staff
Company size



44 Users
Solution size

Solution Components

- Microsoft Dynamics 365 Sales
 - Microsoft Licensing
- Microsoft Dynamics 365 Support Services
 - Microsoft Power Apps

Project Summary

The main phase of the project was to help Reich Insurance migrate their Microsoft Dynamics 365 environment from an old Microsoft 365 tenant to a new tenant. With Strategy 365's certified experts, we helped Reich Insurance move their environments into their new Microsoft 365 tenant without hampering any of their CRM functionality.

Reich Insurance were also looking to train their staff on Microsoft Dynamics 365 & the Power Platform. Strategy 365 provided official training courses via one of our many partnerships, [Training 4 Dynamics 365](#), who helped professionally train Reich Insurance's staff and smooth the transition to their new CRM system.

After Reich Insurance switched their licences to Strategy 365, they also requested for Strategy 365 to provide ongoing support services for their Dynamics 365 solution. Through a support service agreement, Reich Insurance have the ability to use Strategy 365's expertise in many ways, including:

- Break/fix issues
- Solution enhancements
- Customisations and Development
- On-site consultancy
- On-site training
- Telephone support
- Advisory Service
- Remote Assistance
- Upgrades

Our Support Services provide Reich Insurance peace of mind that should anything go wrong with their solution, or should they need any assistance, training or further development, Strategy 365 are on hand to help them. To find out more about our support services packages, please visit our website [here](#).

Several months later, Reich Insurance required a system for their internal auditing needs. Following analysis, Strategy 365 implemented a Power Apps canvas app which provides a bespoke and intuitive interface for their users. You can find out more about canvas apps [here](#).

Key Deliverables

- Reich staff to become self-sufficient
- Dedicated Dynamics 365 training for staff
- Migration of Microsoft Dynamics 365 environments
- Support Services for Microsoft Dynamics 365
- Pixel-perfect bespoke canvas app for auditing

Benefits

Migrating Reich Insurance's Dynamics 365 environment and providing ongoing support has brought many benefits:

- Migration of Microsoft Dynamics 365 from old tenant to new tenant ensured no key data was lost
- Official Microsoft Dynamics 365 training via a partner for Reich Insurance's staff ensures they have the required knowledge and skills to manage the system
- Ongoing support services for Reich Insurance to utilise in a variety of ways
- A streamlined and scalable process for internal audits

"We've had very few problems following our Dynamics 365 migration. Thank you for all your help, it couldn't have gone any better."

Andy Kay, Chief Risk Officer, Reich Group of Companies