



Grupo Financiero Aserta  
Mexico City, Mexico  
www.aserta.com.mx

### Industry:

Financial Services

### Annual Revenue:

US\$120 million

### Employees:

325

### Oracle Products & Services:

Siebel Customer Relationship Management  
Siebel Call Reports  
Siebel Financial Services Business Analytics  
Siebel Finance Sales  
Siebel Finance Services  
Siebel Finance Executive

**“The main factor in our decision to select Oracle’s Siebel customer relationship management applications was that along with being the leader, it’s the best solution in the market. We evaluated other providers and without a doubt, Siebel’s flexibility, and our ability to adapt it to our idea of a business model, convinced us.”**

– Enrique Murguía, General Manager, Grupo Financiero Aserta

## Grupo Financiero Aserta Integrates Information and Extends Operating Visibility to Its 27 Branches

In 2007, Afianzadora Aserta and Afianzadora Insurgentes joined forces to form Grupo Financiero Aserta. Both companies are well known, with a long track record in the Mexican administrative bonding sector. The company aims to provide superior support and reliability to its clients throughout one of the most important underwriting capabilities of the Mexican bonding system. The combined group has 325 employees and 27 branches throughout Mexico.

### Challenges

- Integrate information in a solid IT infrastructure to provide visibility throughout the organization
- Automate administrative processes to increase the company’s competitiveness and productivity
- Centralize bond underwriting to achieve operating efficiency in authorizing bonds
- Decentralize the process of issuing policies to improve times for approving bonds
- Develop business indicators that allow better follow-up and control of sales made through agents
- Reduce and control IT infrastructure and maintenance costs

### Solution

- Implemented a customer relationship management (CRM) application structure, enhancing information visibility throughout all 27 branches
- Integrated critical business functions, improving administrative processes while increasing the company’s productivity by 5% in 18 months
- Centralized bond underwriting procedures, improving operating efficiency in authorizing and delivering bonds and policies
- Decentralized policy-issuing procedures, reducing bond approval times from two hours to 30 minutes
- Improved follow-up and control of accounts receivable and of premium renewals
- Allowed rapid access to claims indicators, permitting specialists to make more informed decisions
- Provided clients and agents with access to reliable, up-to-date information in a Web environment
- Reduced IT infrastructure and maintenance costs by 60%