

# La Caja Improves Visibility into Business Processes with an Integrated IT Platform



La Caja  
Buenos Aires, Argentina  
[www.lacaja.com.ar](http://www.lacaja.com.ar)

## Industry:

Public Sector

## Annual Revenue:

US\$410 million

## Employees:

2,033

## Oracle Products & Services:

Oracle E-Business Suite  
Oracle Financials  
Oracle Marketing and Sales  
Oracle Telesales  
Oracle Service  
Oracle Inventory Optimization  
Oracle Developer Suite  
Oracle Reports  
Oracle Application Server  
Oracle Database

## Implementor:

Oracle Consulting

*“Our Oracle system operates independently from the system used to generate a transaction or sale, which allows this same transaction to be opened and closed by any other employee, avoiding process repetition or the creation of different quotes on the same item.” – Marcelo Schurmann, Systems Manager, La Caja*

La Caja has the most assets of any business in the Argentine insurance market. It is seventh in Latin America in terms of volume of premiums issued and geographically, it is the most widespread insurance company in Argentina. When the present shareholders of La Caja took control of the company in 1994, the insurance market had been opened to intense competition due to the lack of previous development of this market, as well as the stable economic conditions in the country.

These conditions required La Caja to adopt a solid business strategy, including the implementation of robust applications and technological solutions that could support this important commercial growth. As a first step toward this objective, the company adopted technological and customized applications, which were the most adequate to meet the needs of La Caja.

La Caja’s initial challenge was to ensure that a solution designed for back office use could complete a sales cycle and support the company’s growth. The company selected Oracle because of its industry leading databases and development tools. Oracle’s applications and infrastructure software meet La Caja’s needs. They are available for 600 users and they help direct the company’s technological growth toward a 100% Web based system.

## Unique IT Infrastructure Improves Visibility into Financial Processes

La Caja’s strategy was to implement a technology infrastructure and application suite that would allow users to access information and complete tasks through one main system, making it possible

**Key Benefits:**

- Achieved high information availability in database
- Optimized resources and improved customer service
- Integrated the CRM and ERP applications
- Simplified technology infrastructure, reducing IT maintenance costs

**“The logic of our business is centralized in the database and the procedures kept therein. With Oracle Database 10g, it is possible to access them from anywhere, which greatly facilitates building the same functions in other environments.”**

Marcelo Schurmann  
Systems Manager  
La Caja

to attend to a customer in a branch office, through a call center, or through the Internet, all with one application.

“This idea emerged at the beginning of 1996, even before customer relationship management (CRM) was a hot topic of conversation,” said Marcelo Schurmann, La Caja’s Systems Manager.

The implementation of the integrated Oracle E-Business Suite allowed users to conduct work through any of the service channels in a totally transparent way. For example, the solution enabled faster reactions to changing internal and external conditions through real time visibility of finances and continuous performance measurement. Furthermore, when La Caja realized its existing system was not sufficient to maintain the budget and finance end of the business updated, the company implemented Oracle Financials as its financial management solution for its high level of transparency for all users and its user-friendly tools. The applications allowed the organization to collaborate among departments more effectively, provide its employees with self-service capabilities, greatly reduced paper-based processes, and -- most importantly-- integrate its diverse financial systems. In addition, with Oracle’s solutions, La Caja provided its employees with the ability to deploy the solution via the Internet, allowing them to access critical financial data anytime, anywhere.

### **Information Centralization and Web-Based Environment Optimize Customer Service Response Time**

La Caja developed other business models under the same “technological umbrella.” For example, the company implemented Oracle TeleSales (a CRM tool) to allow everyone on the network to see a customer complaint or action, no matter where it originates. The Accident Estimator, which is an adaptation of the application, makes it possible to differentiate by province the value of an item, or an hour of labor, with the help of a centrally managed system. The Service Queue System is a customization that provides information on how many people are waiting to be helped and for which type of service, along with wait time estimates. As such, all branch offices have tools with which to respond if they are about to exceed these estimated wait times and as a result, can improve customer service significantly.

This implementation, for which La Caja obtained an ISO 9002 rating, allowed the branch offices to adjust their resources

according to peak hours and optimize customer service response times. In addition, the Oracle infrastructure has enabled La Caja to deploy new programs quickly. For example, the organization rolled out the Caja Plus system (customer loyalty program), which gives away exchangeable “kilometers” as prizes during certain events that the company puts on for its clients in only 20 days.

Reproducing this structure on the internet was slightly complex, because meeting the security requirements and the corresponding profiles required La Caja to repeat several already-existing procedures using Oracle tools. La Caja created a function called Agenda, which shows customers that asked to be called again and the transaction type processed by the telephone operator. This functionality enables the vendor to know the day and time he should call the customer, as well as which service or product interests the customer. The same functionality was reproduced on a web-based environment.

### **Why Oracle?**

“We are certainly Oracle oriented. The integrated CRM and financial applications allow us to keep all data in a centralized location and avoid large costs associated with integration and incorporating new system concepts in a simple way,” said Schurmann.

### **Implementation Process**

La Caja’s technical team undertook the system change to Oracle’s applications version 11.5.8 in record time, thanks to the innovative proposal offered by Oracle Consulting. As the second company in the country to benefit from the Oracle Consulting team’s valuable assistance, La Caja was able to successfully migrate systems in the planned amount of time and achieve high productivity levels without slowing down operations.

“We opted to switch over to the new system with the old system still intact and prepare the application so that it would work just as it had in the previous version. With Oracle Consulting’s help, we were able to quickly complete both the switchover of pilot data and the production system,” said Alejandra Vilchez, Systems Developer Analyst for La Caja. “In the same manner, Oracle Consulting developed the adaptations for certain applications.

From the beginning, the production levels were satisfactory and by the second day all the users were working normally and without difficulty. It was a successful implementation from everyone's point of view."

*La Caja is the most widespread insurance company in Argentina and is seventh in Latin America in terms of premiums issued.*