



The Customer

- **Industry:** Financial Services
- **Geographics:** Headquartered in Santiago, Chile
- **Assets:** \$2.5 Billion
- **Employees:** 3,000

PeopleSoft Enterprise Products

- Customer Relationship Management
- CRM Warehouse
- HelpDesk
- Marketing
- Mobile Sales
- Sales
- Support Self Service
- Support
- Telemarketing

Implementation Team

PeopleSoft Global Services

Customer Service Level

Standard

“Throughout our PeopleSoft Enterprise CRM implementation, we counted on outstanding support. In fact, many of our actions were the result of joint analysis—a process that continues to this day.”

Verónica Ruiz

Head of Development and Service Quality

Consorcio Financiero

Business Challenge

Consorcio Financiero planned to make major changes to its organizational culture. The company needed a way to put customers at the center of its business processes and daily operations.

PeopleSoft Enterprise Solution

Consorcio Financiero has successfully implemented Oracle's PeopleSoft Enterprise CRM, enabling the company to gain a complete view of its customers and manage customer relationships online.

Business Benefits

Consorcio Financiero uses PeopleSoft Enterprise CRM to:

- Issue customer service reports that are targeted to company management.
- Deploy a customer knowledgebase to every member of the company.
- Access customer service histories—in minutes—to monitor the performance of customer service representatives.
- Determine which channels are most heavily used and measure cost/benefit ratio.
- Quantify metrics for customer support management.

Quantifiable Benefits

- Measuring support rendered in 15,000 to 22,000 cases per month, covering all contact channels.
- Tracking and logging the daily activity of customer service representatives.

Consorcio Financiero Invests in a Client-Centric Strategy with PeopleSoft Enterprise CRM

In 2000, after more than 80 years as a leader in Chile's financial industry, Consorcio Financiero set out to transform its company culture. The company sought to make clients the focus of all its business processes. But Consorcio Financiero lacked technology that could provide a complete view of the customer and allow the company to manage contacts online.

“We had a contact center service that just kept growing to meet the number of calls,” recalls Verónica Ruiz, head of Development and Service Quality. “But there was never any technical support for managing this activity properly. We handled everything manually with email and Microsoft Excel spreadsheets.”

To enable more personalized and responsive customer service, Consorcio Financiero implemented PeopleSoft Enterprise CRM. The company can now access customer information through a single, integrated system that includes marketing and telemarketing capabilities. "PeopleSoft Enterprise has enabled us to improve service, optimize response times, and define workflows and areas of responsibility," says Ruiz. "Our internal back-office suppliers can now see that behind every action or request they receive, there is a client who has specific needs."

Rapid Adoption, Greater Productivity

Consorcio's employees quickly recognized the advantages of using PeopleSoft Enterprise CRM. "At first, we estimated that the number of concurrent PeopleSoft Enterprise users would be about 70," says Ruiz. "But lately, that figure has been around 150, mostly due to the benefits we're achieving."

Consorcio Financiero conducted a post-implementation user survey that covers factors such as system features, availability, speed, and whether the system made work easier or more difficult. Employees rated the system highly in all areas.

Measuring the Impact of Superior Service

With PeopleSoft Enterprise solutions, Consorcio can track and log the daily activity of its customer service representatives. The company has a complete view of the service rendered in 15,000 to 22,000 cases per month across all channels. Managers can access customer service histories online to monitor staff performance.

By using PeopleSoft Enterprise CRM Analytics, Consorcio can issue customer service reports that are targeted to upper management. The reports highlight key metrics such as number of cases handled per month, most important product lines, and channels used to make contact. By determining the usage levels of its service channels, Consorcio can measure its cost-to-benefit ratio and use its customer service budget more wisely.

Partnering with PeopleSoft Enterprise for Ongoing Success

Although Consorcio's business strategy changed several times during the implementation process, the company met all its project deadlines with help from PeopleSoft Enterprise.

"First, we decided to include our main products such as life insurance, annuities, and general insurance," says Ruiz. "Later, after going into production, we carried out a series of projects in parallel in which we brought in other products that had not been included in the original plans, as well as new features."

Consorcio carried out its entire training process in tandem with the PeopleSoft Enterprise team. The first testing period involved a group of representatives at the Santiago contact center. This group later helped duplicate the model in other branches. Consorcio also established a distance learning system in which regional users could access PeopleSoft Enterprise online and speak by phone with monitors who could provide guidance and answer questions.

Throughout the implementation process, Consorcio Financiero worked with PeopleSoft Enterprise to deliver solutions that directly addressed business needs. "We counted on outstanding support from PeopleSoft Enterprise's staff," says Ruiz. "In fact, many of our actions were the result of joint analysis—a process that continues to this day."