



➤ Groupe Mornay calls on Selligent to improve its customer service

Social protection

Since 1947, Groupe Mornay has staked its claim as a major player in the French social protection sector. Its business areas cover supplementary pensions, providence and social action. Since its beginnings, the Group has been committed to offering its members tailored social protection and solutions in line with prevailing needs. In 2005, with this commitment in mind, the Group defined a customer relationship strategy aimed at improving customer service by making it easier for customers to access and understand information, raising service quality and improving performance.

➤ A global approach to customer relationships

A number of projects were identified to underpin these strategic directions – introduction of a new client front-office business line, development of extranet tools enabling Web-based on-line services, review of how customers are received in the agencies, creation of new mail guidelines for correspondence, and the deployment of a CRM tool. The latter had to meet two goals: rapid access to customer information to answer client questions; and customer information sharing among all Group employees (including traceability of customer contacts). As Rémi Lautraite, Groupe Mornay Customer Relations Manager, explains, “at the time, customer information was stored in a patchwork of tools. It’s true that they enabled each department to do its job, but there was no sharing of information. So the idea was to implement a tool that was common to the

Marketing, Sales and Customer Care departments, with the expectation of expanding the customer base and improving customer loyalty.”

➤ A methodology that works

Based on specifications that were decided on in April 2006, Groupe Mornay launched a call for tenders from CRM developers. They also considered the possibility of internal development, but this option was quickly set aside. As Lautraite confirms, “in view of the wide variety of offerings available on the market, in particular for the Marketing and Sales areas, we didn’t think it was sensible to try to re-invent the wheel. Furthermore, we knew we could count on a team in our IS department* dedicated to selecting and implementing the software packages using a cutting-edge methodology. In fact, this methodology was a great help in structuring our call for tenders.”

Frédéric Galbez, head of IT Purchasing, adds, “according to our methodology, we start by deciding which suppliers to approach and we submit structured specifications together with a factual analysis grid. Each element of the response is then qualified by different individuals and then weighted. Consolidating the results enables us to come up with a short list. Then the selected solutions are scrutinised in more detail – technically, functionally and contractually. This process ensures that we are able to select the solution best suited to our needs.”



The Selligent project team committed to a single objective: customer satisfaction

* On January 1, 2008, the Groupe’s IS department was integrated with the CIGMA GCA teams to form Aramice..

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➤ A horse with four legs

Groupe Mornay was keen to have a solution covering the needs of its users, but one that was easy to get started. CRM offers innumerable possibilities, and it was important for the company to define its expectations realistically, based on what they already had, and to set priorities to keep focused. An approach, in short, that Galbez explains with a vivid illustration: "it serves no purpose to have a horse with 18 legs! Five is already complicated enough, but three is lop-sided! Very often, when the project owner doesn't stick to the methodology, there's a tendency to ask for functions that, at the end of the day, are not going to be used. The pragmatism of the project owners was crucial to the success of the selection process."



➤ Simplicity and scalability

The three shortlisted developers were invited to produce a mock-up based on Marketing, Sales and Customer Care scenarios created by the project owners. The solutions they came up with were analysed in detail, both technically and functionally. "This enabled us to note the responsiveness of the suppliers and their ability to understand our needs and translate them in their solution," Lautreite stresses.

In December 2006, at the end of this second phase, Selligent won the day. Other than its ease of configuration, which gave Groupe Mornay a measure of autonomy in its system maintenance, the Selligent system was preferred by the users because of its simplicity and ergonomics. The group was entirely swayed when it saw the numerous references Selligent could show in other social protection organisations.

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information.**



Rémi Lautreite |
Customer Relations Manager.

➤ Pride of place to Customer Care

Initially, Groupe Mornay decided to restrict the functional scope to Customer Care. As Lautreite points out, "we had to respect very ambitious lead times for starting up a new, strategically important telephony platform. Adhering to the timetable was crucial."



To do so, the group started working on defining the configuration together with Alti, the systems integrator proposed by Selligent, while still finalising the commercial details. Implementation started mid-February 2007, and on June 20 of the same year, the agents recorded their first telephone reports. "Four months is extremely short for the amount of work to be accomplished and the data volumes to be loaded into the Selligent system (over a million enterprises and 14 million individuals). The support and engagement of top management, who gave us the financial and headcount resources, also contributed significantly to the success of the operation."

➤ In-depth change

Today, the CRM system is being used by 200 Customer Care employees. Thanks to the integration of the CRM system in various management systems, the 16 client advisors in the telephone platform use Selligent to access all client-related information – status, contracts, payments, etc. They field over 80% of questions, the remainder being transferred to the management department, which also uses Selligent. A telephone report is established for all queries handled, be they level one or level two. In the pilot phase, the advisors inputted around 400 reports into Selligent daily.

Although implementing Selligent has completely changed their way of working, the users adopted the tool in record time. According to Lautraite, “their rapid adoption is doubtless the result of our pragmatic approach – we introduced a tool that was simple yet covered 95% of needs, as we have not had to introduce any major change since June 2007. And the fact that the users were very involved in all the project phases, from selection right up to validation of the configured solution, has clearly contributed to the smooth start up.”

➤ Reassure to underpin loyalty

A recent survey of users highlighted their considerable satisfaction. In fact, they gave maximum points to the system. A second survey is in process to measure customer satisfaction. “The CRM is part of an overhaul of our customer relations,” notes Lautraite, “and it is this overall process that contributes to customer satisfaction. However, it is clear that, thanks to our CRM implementation, our customers now have the feeling that they are taken care of immediately and in a professional way by agents who have rapid access to the information. The customers are reassured because they know that we keep track of the conversation and are sure that their requests are handled in real time.”

➤ Roll-out continues

While the objective of the initial phase was to anchor client loyalty, the aim of the second phase is to optimise the sales and marketing approach so as to acquire new customers.

The direct sales network and the sales representatives responsible for relations with the brokers will be next to



Groupe Mornay Customer Care

profit from the tool, which they are already awaiting with impatience. The needs, which were defined when the specs were determined, are now being fine-tuned. And then it will be the turn of Marketing.





➤ Secret of success

According to Lautreite, the recipe for carrying out a successful CRM project has many ingredients – strong engagement from the project owners, unflinching support of top management, the involvement of all the functions concerned, but above all a realistic approach that does

not lose sight of the original goal: to serve the client by providing the people who have a real need with a tool that is tailored to their task. “We are delighted with the way the project advanced, in time, on budget and meeting objectives.”

➤ About Selligent

Selligent, the European leader in interactive marketing and Customer Relationship Management, has been developing and marketing since 1990 operational, collaborative and analytical solutions aimed at boosting the organization, actions, and interactive communications of teams in direct contact with customers, prospects, and business relationships. Selligent solutions enable marketing, sales, services and consulting departments to develop interactive, effective, and sustainable relationships with all their contacts and ecosystems. Selligent offers a unique approach combining agility, pragmatism, and engagement, and guarantees its customers a fast and significant return on their investment.

You can find all our customer success stories on

www.selligent.com/success

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