



## ➤ Réunica capitalises on better understanding customers

### Mutual fund

Réunica is a major player in the social protection sector and one of France's leading supplementary pension funds. Réunica provides a full range of offerings according to five business lines: pension, providence/healthcare, savings, social action and vacations. Its mission is to support and advise its customers in all aspects of social protection through a network of specialists throughout France. In 2001, Réunica selected Selligent to consolidate and share information so as to provide its sales force with a complete overview of its customer base. They repeated their trust in Selligent in 2006 when the need to steer their customer service organisation arose. Today, Selligent facilitates the day-to-day work of over 300 people in the group.

### ➤ Personalised approach and client understanding

It was back in 2000 that Réunica's deliberations on CRM took shape. They wanted to conquer new client targets and reinforce their competitive advantage. So they set up a plan to improve client relations, which included replacing their home-grown prospecting tool with a proper CRM system. The prime objective was to consolidate and share information via a common sales and marketing database so as to provide the sales force with a complete and compact client overview. By improving its knowledge of customers, Réunica can more efficiently handle their demands, manage their needs on a personalised basis and in real time, and provide them with the right offering at the right time.



Having access to the background on contacts allows us to personalise our relationship with clients and improve the quality and efficiency of the service provided.



Philippe Deboès | Customer Relationship Manager

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## ➤ Rapid ROI

At the end of June 2001, after a lengthy selection process, Selligent was chosen unanimously, primarily because of its ease of use and integration. And the results came thick and fast, as Roberto Chrétien, Head of Organisation Development, explains. "As soon as the solution was operational, we launched a first mail shot. Thanks to its precise targeting and efficient monitoring, the revenue from the operation turned out to be several times the cost of the campaign itself." Also, Selligent enabled Réunica to implement cross-selling and up-selling strategies which resulted in a marked increase of the number of products per client and the value of the client portfolio.



## ➤ The advent of new needs

Five years later, the merger of Réunica with Bayard Retraite Prévoyance marked the beginning of a new adventure. Philippe Deboës, Customer Relationship Manager, recalls the situation at the time. "Bayard already had a Customer Care department which was equipped with a tailor-made tool – but it had limited scalability. The merger was the opportunity to start afresh. So we set off in search of a solution that would enable us to track all interactions and support the future growth of the service."

A call for tenders was launched, addressing the suppliers who already supported the two groups, and the choice



came quite naturally. "We wanted to maximise the interactions between the sales force and Customer Care using a common tool with common processes. Our colleagues from Sales and Marketing were satisfied with their system and didn't want to change. On our side, we were convinced by Selligent's Customer Care functionality, which responded perfectly to our needs," Deboës emphasises.

## ➤ The key to success – scalability

Both for the first project and the second, Réunica leveraged Selligent's agility by introducing its solution progressively. Thanks to this pragmatic approach, the tool was soon delivered to its users, even though not all the needed functionality was available right from the start. This had a two-fold advantage. It facilitated user adoption by giving them time to become familiar with the new processes, and it enabled the company to fine-tune the solution based on user experience and adapt it to their needs.

By proceeding in this way, the sales force and marketing had an operational version after only three months. And the Customer Care department first deployed the system for their healthcare business line. Today, all the businesses managed by Réunica are integrated across the scope defined in the project specs. But the solution is updated quarterly to respond to new needs that emerge from its daily use.

## ➤ An interface adapted to each need

Pragmatism is also manifested in the interfaces the users are offered. All the CRM users, of course, use the same application, but the screens, functions and visible information vary according to the user profile. Customer Care, in particular, enjoys a tailored interface characterised by its stripped-down style. A few fields, checkboxes and context buttons are enough to do most of the agent's tasks. Philippe Deboës explains, "all the calls come in to an agent, who identifies the client, verifies his or her co-ordinates and accesses the contact history file. Depending on the subject of the call, the agent switches to the corresponding business application using the active context buttons in the Selligent interface. Generally, that is where the answer to the client's question is to be found. The agent can then end the call and record the contact in Selligent."

In addition, Réunica has developed a specific tool, based on Selligent's Web services, which enables the agents to transmit the requests they cannot handle directly over to non-Selligent-user departments. "These are around 300 to 400 people who use the Selligent functionality indirectly via Web services. The tool works both ways – the request is sent from the Customer Care people to the appropriate department and the result is then stored in Selligent," explains Deboës.



## ➤ Multi-channel

The Réunica Customer Care department started out with 15 people and has now grown to around 100 serving individual clients in the different group businesses (pensions, providence and healthcare) or switching the calls that are for other departments. In 2008, they handled close to 900,000 calls, and even up to 100,000 calls a month during peak periods. But Customer Care is more than just fielding inbound calls. All interactions with the client, via whatever channel, are tracked in Selligent. "As a result," Deboës says, "when a client walks into one of our branches, he/she receives a printed summary of the discussion produced by Selligent before leaving. The same applies to questions sent by e-mail, whose replies are stored in Selligent. At present, they are still entered manually, but to improve efficiency, we are planning to interface Selligent with our e-mail management tool (Eptica) in the not too distant future."



We have firm commitments to our clients. With Selligent we can measure our performance compared to the objectives.



Philippe Deboës | Customer Relationship Manager

## ➤ Synergies, ROI and certification

Although Customer Care does not have a sales mission, it participates actively in detecting opportunities. When an agent detects an opportunity or the risk of a cancellation, he/she informs the sales department through Selligent. Which means, for example, that the sales reps can better prepare their client visits by being aware of any complaints they might have. In this way, Réunica leverages all the synergies resulting from information sharing at all levels. But for Deboës, the ROI the Customer Care department derives from Selligent is mainly in terms of quality. "By having the history file of contacts, we can personalise our relations with the client and enhance the quality and efficiency of our service. In fact, we have firm commitments to our clients: 80% of questions must receive an immediate response and the remaining 20% be handled by the appropriate department within five days. So, with Selligent we can measure our performance against objectives and, if necessary, take corrective action. Because of this, Selligent helped us to obtain our ISO 9001 certification."

The Customer Care management team also analyses the CRM data regularly to understand the main reasons for calls or complaints. Then, together with the Services Management department, they define directions for improvement so as to assure the best possible service for its clients.



### ➤ New challenges in view

The 2009 challenge for Réunica’s Customer Care will be to improve the reception process, notably thanks to CTI. “Linking Selligent with our telephony system will be a major step forward,” says Deboës. “We would like to be able to keep a record of the wait time and the length of conversations, and in particular be able to identify the callers by their telephone numbers, personalise inbound reception and quickly put them through to an agent they have talked to in the past.”

One thing is certain. Selligent has become indispensable to Réunica. “To communicate properly with a client, it is essential to know his/her background and needs. This client knowledge is the prime added value that Selligent brings us. Today, we simply could not do without it,” he concludes.

### ➤ 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](http://www.selligent.com/success)

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