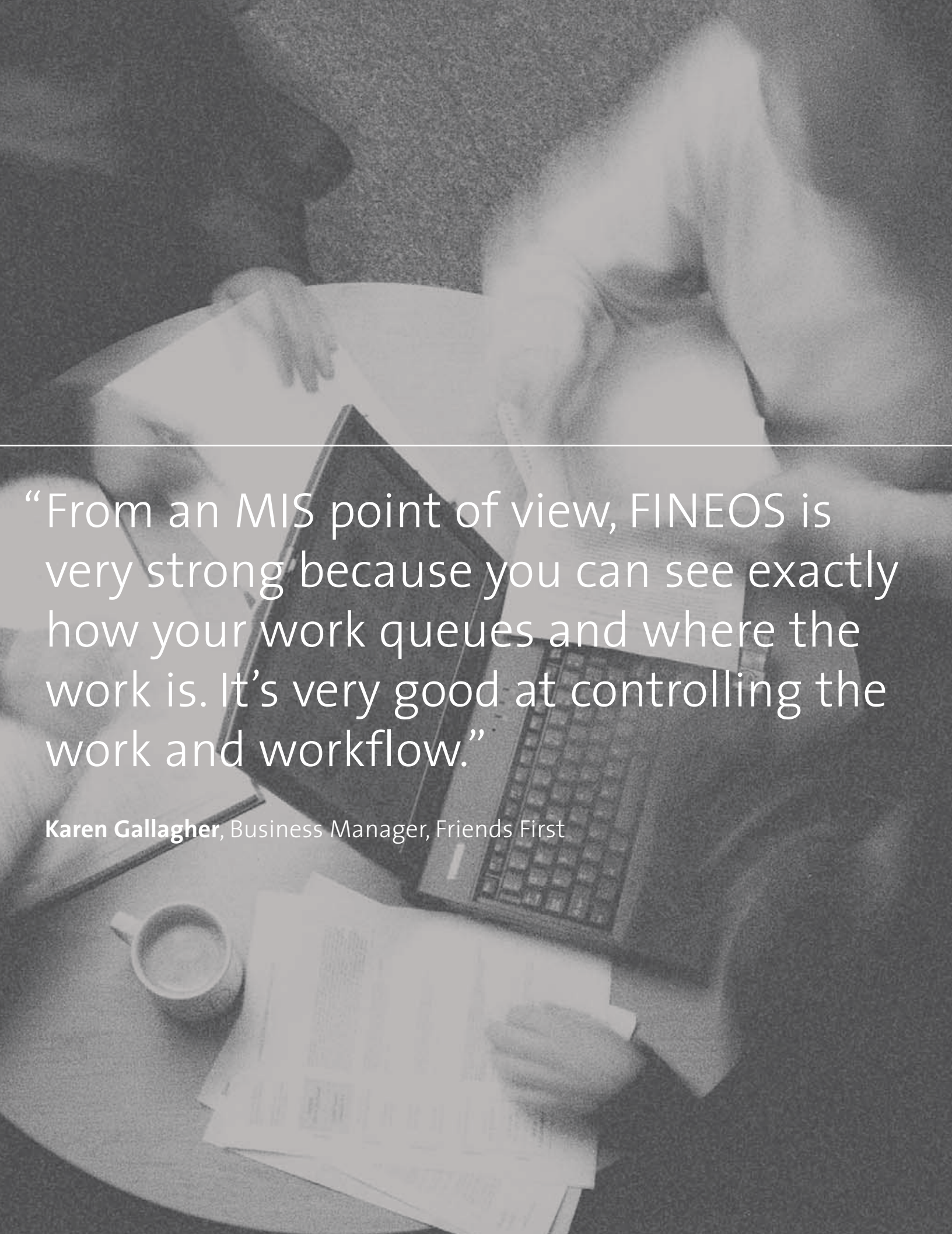




Case Study

Friends First

A black and white photograph showing a person from an overhead perspective, sitting at a desk. The person is wearing a light-colored shirt and is looking down at a laptop. The desk is cluttered with several sheets of paper, some of which appear to be spreadsheets or reports. A white coffee cup is visible on the left side of the desk. The background is dark and out of focus.

“From an MIS point of view, FINEOS is very strong because you can see exactly how your work queues and where the work is. It’s very good at controlling the work and workflow.”

Karen Gallagher, Business Manager, Friends First

A friendlier approach to customer service

How Friends First uses FINEOS to drive productivity and better serve customers

A conglomeration of four businesses, Friends First has enjoyed exceptional growth in recent years. With total assets of €4.45 billion, it provides a comprehensive range of assurance, insurance, banking and investment products to more than 220,000 customers. Having recently merged, Friends First is determined to continue building a formidable brand presence in its market.

SETTING THE AGENDA

Friends First launched its new group identity in 1998. It had a clear business objective – to become a “broad-based financial services provider” – and to grow.

But first the company faced a number of critical hurdles. As with all traditional financial services companies, Friends First staff was used to servicing policies as opposed to brokers and customers. So one of its major shifts in focus would be to adopt customer service as a core strategy. Management put it simply:

“If we look after our customers better than the competition then everything else that is important will follow.”

Also the company’s IT platform was a complex myriad of systems with questionable data quality – the result of acquisitions. Indeed, not all of them were under the control of the Irish operation as some were based in the UK with its former parent company.

In response to these challenges, the management team set themselves several key objectives. The focus of the company’s new infrastructure would have to provide a single, integrated view of the customer across all businesses. It would have to cater for different ways of doing business – whether through direct or broker channels – and in time be capable of accommodating whatever channels might emerge, such as digital TV or WAP access. In addition, it would have to be flexible enough to accommodate changes in future business strategy.

THE CUSTOMER STRATEGY

FINEOS has been deployed across Friends First’s life company, the call centre, customer services and distribution services area, and across the branch network.

With the new integrated system, Friends First is beginning to better understand customers, their needs and changing requirements.

A two-way interface with back-office administration systems ensures efficient transfer of new and updated customer data to the administration systems and also that key policy data is available to answer customer queries in real time.

Tasks are directly set up by support areas and automatically queued for administrative work. This practice alone has helped to cut out roundabout and time-consuming emails and phone calls.

“In the call centre when people ring in, agents now have full visibility of the task whereas before they had to do an awful lot of call backs; before, they had to check with the Admin area and ring the client back. That has definitely led to an improvement in service,” explains Karen Gallagher, Business Manager at Friends First.

Another key benefit of FINEOS is that it has become a prime tool for Team Leaders in monitoring work queues. Because there’s now full visibility of tasks within Customer Services, information on how each area is performing against service levels is available to management. **“From an MIS point of view, FINEOS is very strong because you can see exactly how your work queues and where the work is. It’s very good at controlling the work and workflow,”** explains Gallagher.

THE JOURNEY CONTINUES

The move from product to customer focus, establishing strategic partnerships with its software supplier and a commitment to continual improvement have ensured a successful implementation at Friends First. The greater benefits to the company, customers and, indeed, staff are still to be enjoyed.

One of these benefits has been saving time, a precious commodity in today’s business world. **“In the Underwriting Department it used to take a day to get an old file. Now they can actually see it straight away on the system,”** says Gallagher.

At present Friends First is constructing a customer value model. It is also using the information in its customer database to profile general insurance customers to identify those who are likely to be interested in life products. Product offerings in each broker segment are also currently being evaluated. FINEOS’s solution will continue to provide the technological armour for these and other of Friends First’s business strategies.

“In the call centre when people ring in, agents now have full visibility of the task whereas before they often had to check with the admin area and ring back. That has definitely led to an improvement in service.”

Karen Gallagher, Business Manager, Friends First

FEATURES

- Integrated, up-to-date view of customers
- Detailed analysis and segmentation of customer base
- Pipeline report generation for sales channels
- Process automation and intelligent routing of tasks

BENEFITS

- Enhanced understanding of customers' needs and requirements
- Improved service level turnaround due to elimination of manual transfers
- Better customer service
- Improved MIS through better monitoring of work queues

Channels:	Customer services centre, call centre, branch network
Number of users:	200
Legacy integration:	Life/400 on AS/400, MVS
Application platform:	Windows NT application servers, Oracle on IBM AIX
Third-party software:	FileNET

For further information on FINEOS banking and insurance enterprise solutions, visit us at www.FINEOS.com

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