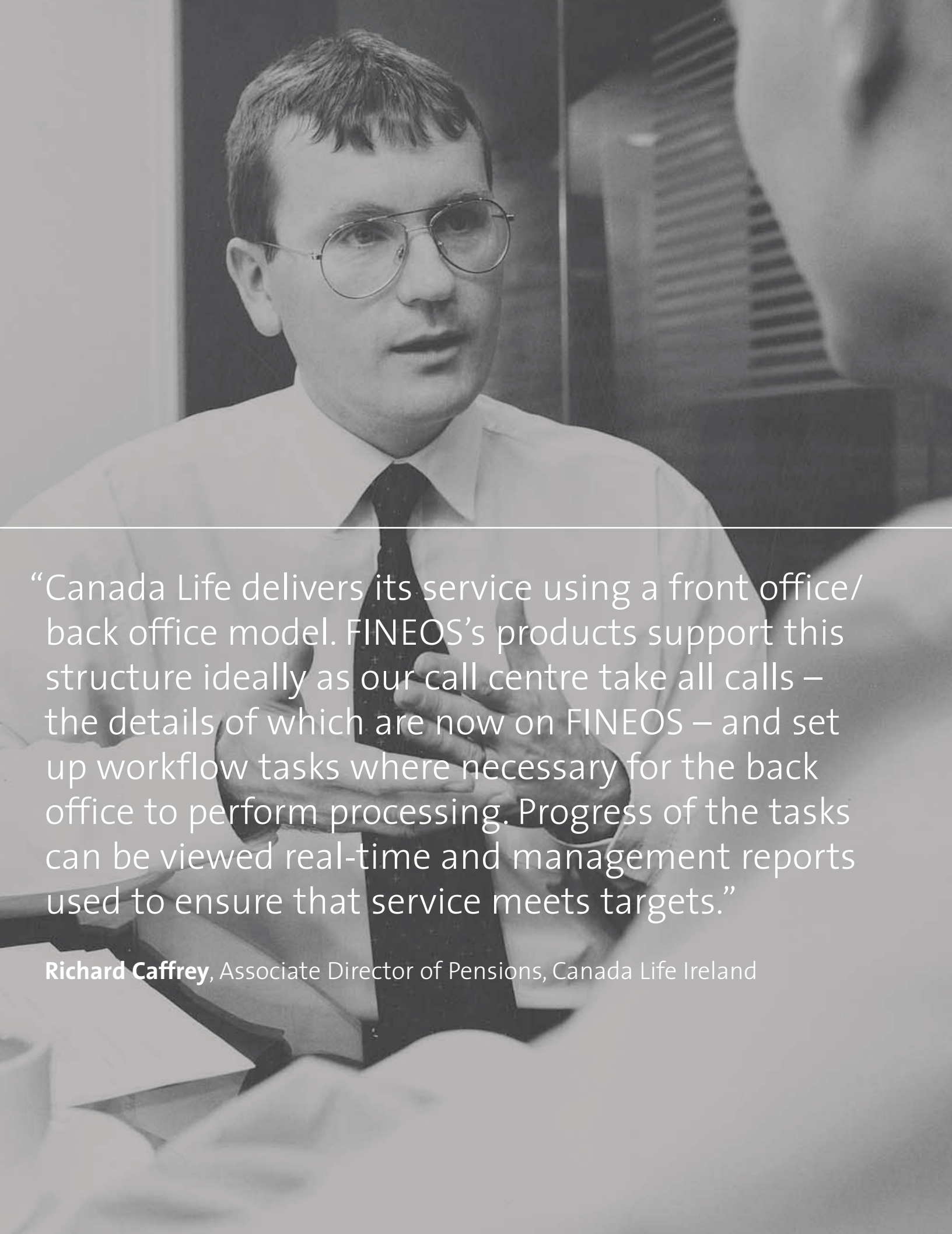




Case Study

Canada Life Ireland



“Canada Life delivers its service using a front office/ back office model. FINEOS’s products support this structure ideally as our call centre take all calls – the details of which are now on FINEOS – and set up workflow tasks where necessary for the back office to perform processing. Progress of the tasks can be viewed real-time and management reports used to ensure that service meets targets.”

Richard Caffrey, Associate Director of Pensions, Canada Life Ireland

Committed to excellence in customer care

How Canada Life Ireland uses FINEOS solutions to boost customer retention and acquisition programmes

With 200,000 policy holders and assets of more than €1.3 billion, Canada Life Ireland is part of one of the most venerable institutions in the life assurance business. Responding to the tremendous forces of change within its industry, the company chose FINEOS's customer relationship management (CRM) solutions to help meet ever-rising customer service expectations and to improve the workflow around its organisation.

CHALLENGES

For Canada Life Ireland to meet customer expectations across a growing number of touchpoints and to increase efficiency across related business processes, it had to address a number of issues within its organisation.

Information was spread across different legacy-based systems so no one department could access the breadth or depth of information that was needed to respond to customers in the way the modern business environment demanded. The ability to service a series of customer issues each with its own timeline and interdependencies as a single case was lacking. And without complete and readily accessible customer information, cross-selling opportunities could not be maximised. In addition, the absence of a workflow system meant that the hand-over or assignment of tasks, tracking of their progress and management of the workload were all achieved manually – and that, in turn, meant inefficiencies.

So, in order to enable “quick wins” at the user level, Canada Life Ireland was keen to achieve several objectives. It wanted to create a single point of entry to ensure a consistent level of service and to ensure that customer information would be readily accessible to any staff member. It wanted to simplify the creation of – and appropriately route – business processes and improve the monitoring of service levels and administration performance.

Finally, it wanted to integrate seamlessly with specialist tools such as Imaging and CTI (computer telephony integration) systems.

AN ADDED DIMENSION

A year from going live, FINEOS's solutions have reinforced and enabled Canada Life Ireland's provision of excellent customer care. With full information easily accessible to staff and complete with a workflow automation tool that supports the level of efficiency needed, the company has already had early payback through increased levels of customer service and satisfaction.

“We initially experienced a 70% reduction in calls from our front office to our claims department, which would have been queries about what's happening on a file or what's outstanding and so on. I have no doubt that the quality of service has improved significantly as a result,” says Richard Caffrey, Associate Director of Pensions, Canada Life Ireland.

With the automation and management of work allocation, online information can be accessed in relation to monitoring both service levels and the efficiency of overall administration.

The advantages of this are clear. As Karl Nolan, Customer Services Manager at Canada Life Ireland states: **“The system developed by FINEOS unifies customer information from our current systems, providing a single, enriched view that enables us to gain a more complete understanding of each customer's business needs. It also enables us to automate and manage task generation and provides us with real-time reports on service levels and overall administration performance.”**

CONCLUSION

FINEOS is already providing Canada Life Ireland with the user-friendly systems they need to meet the challenges of competing in a business environment where exceptional service is a must; indeed, they have already produced some measurable results to prove it.

The key to success for Canada Life Ireland in implementing FINEOS was how seamlessly it melded the solution to its business practice. **“Canada Life delivers its service using a front office/back office model. FINEOS's products support this structure ideally as our call centre take all calls – the details of which are now on FINEOS – and set up workflow tasks where necessary for the back office to perform processing. Progress of the tasks can be viewed real-time and management reports used to ensure that service meets targets,”** says Caffrey.

And perhaps most important of all, FINEOS's solutions have won kudos from its most important critics – Canada Life Ireland's service staff. According to Caffrey, **“The product is proving very popular with our service personnel as it conveys a very positive image of the company's commitment to service. And also it's very user-friendly – even within a week it was starting to save time.”** Canada Life Ireland can face the future with confidence. As Nolan maintains: **“This new technology puts us at the leading edge in managing customer contact.”**



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Karl Nolan, Customer Services Manager, Canada Life Ireland

FEATURES

- Ready access to single customer view
- Brokers’ requests captured and routed – irrespective of the medium chosen – to appropriate departments
- Improved mapping of processes and sharing of information
- Ability to view workloads by user, re-allocate as necessary and track the status of work

BENEFITS

- Ability to respond to customer requests on demand
- Real-time processing of partner communications
- Easy staff migration between departments in accordance with peaks and troughs
- Ensures agreed service levels are maintained or exceeded

Channels:	Head office, call centre and branches
Number of users:	400
Legacy integration:	MVS/CICS and CINCOM Supra on AIX
Application platform:	Windows NT application server, Oracle on IBM AIX, Citrix Metaframe
Third-party software:	FileNET

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

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