

#### CUSTOMER CASE STUDY

# Leading Global Financial Services Provider Empowers Critical Customer Service Agents with 360° Views in SugarCRM

At a time when many companies are struggling to meet expectations for customer service, one leading financial services provider has made it an essential element of success. As one of the world's largest asset managers, this company understands just how critical the customer experience (CX) has become—and is taking steps to ensure what they offer is extraordinary.

The business serves more than 92 million customers in 70+ countries with a wide range of insurance and fund products. A large portion of those customers are in the Asia-Pacific region, where people regularly rely on the company's contact center and customer service specialists. Supporting this growing segment of financial service customers has presented a number of challenges. But thanks to a recent overhaul of CX tools and technology, the business has been able to anticipate and fulfill customer needs—often before customers even realize they have them.

**Industry** ///

Financial Services

**Location** ///

South Jakarta, Indonesia

## Customer Data Difficulties

The business has faced its fair share of challenges, including:

### Misaligned Case Management

The customer service team frequently faced difficulties in aligning case management at the regional level. As a result, it was becoming increasingly difficult to plan, process and manage customer accounts.

### Disparate Data and Systems

The company's contact centers serve as the lifeblood of customer service, with agents frequently interacting with customers at pivotal moments. But with so many different systems and sources of data, there were some very big blind spots. Duplicates and discrepancies often led agents to use inaccurate information when assisting customers.

### Incomplete Customer Views

Without a complete and accurate picture of each customer's journey, it became incredibly difficult to meet the needs of each individual. Poor quality records caused the overall customer experience to suffer, and was costing the company opportunities to cross-sell and upsell.

In response to these challenges, the business set out to find a solution that would empower employees with the resources they need to reduce handling times and improve customer satisfaction. Specifically, the business wanted a way to align regional operating entities with master support processes.

## Finding a Streamlined Solution

The business considered most major CRM system providers, and ultimately landed on SugarCRM.

"Sugar was referred by our IT team," said the company's operations and transformation leader in Asia. "Easy configurability was what made us choose Sugar. It was able to provide us with a single platform for achieving all of our objectives."

Starting with its Indonesia branch, the business worked with Elite implementation partner iZeno to begin digitizing all customer communication at the entry point itself. Even in the face of a tight sunset deadline for the legacy ticketing system, iZeno was able to leverage Sugar to develop and deliver a solid replacement on time and on budget.

The company now uses Sugar as a case management system for its branches, call centers and back-end operations.

**"Sugar has become the interface for users to enter communication details, thus ensuring a uniform experience for customers across all communication channels."**

**— OPERATIONS AND TRANSFORMATION LEADER, Asia**

## Fully Equipped Agents and Happier Customers

Since implementing Sugar, complaints have gone down and response times have decreased. The team attributes these successes to 360-degree customer views, as well as the ability to integrate with back-office systems.

There's no more emailing back and forth when addressing customer requests. Customer service agents receive a steady stream of reliable data—all in one central location.

The new system has been so successful, in fact, that iZeno's achievements in Indonesia have generated enthusiasm and discussions with regional entities. Plans are already underway to roll out similar changes to remaining offices across Asia including Thailand, Taiwan, Sri Lanka, the Philippines and Malaysia. Moving forward, the Sugar partner will continue to provide a dedicated support to resolve issues while simultaneously pursuing product enhancements with its development team.



### SUGAR PARTNER

iZeno was founded in 2003 to provide enterprises with custom-built technology solutions they need to keep their business running seamlessly. With a team of 70+ in-house innovators, we have delivered over 500 Enterprise Solutions, implemented and optimized to enable smarter insights. Our team draws on industry experiences in accomplishing a portfolio of mission-critical applications, integrating Cloud, CRM, Data Analytics, and other leading technologies with our clients' existing IT frameworks. With leading presence in the region, headquartered in Singapore and operation in Malaysia, Indonesia, Thailand and Philippines, no project is too complex for us, and our team is always ready for a new challenge.

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## About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit [www.sugarcrm.com](http://www.sugarcrm.com) or follow [@SugarCRM](https://twitter.com/SugarCRM).