

Alexander Forbes Opens Channels of Communication

Alexander Forbes

industry:

Financial Services

country:

South Africa

business challenge:

Providing customers with multiple communication channels to interact with and conduct business, without compromising service levels and communications quality

solution:

Multi-channel call centre that integrates with existing business and workflow applications and streamlines customer contact

services:

- Deployment of a full multi-channel call centre solution
- Application integration services

results:

- Reducing first-time query resolution
- Ensuring availability of valuable 'management' information at the touch of a button
- Integration with the company's customer relationship management (CRM) and workflow application to track client interaction and measure task activities

Executive Summary

Alexander Forbes approached Dimension Data for a **call centre solution to enable interaction for clients** with the business via voice, fax and e-mail.

Since the implementation of Dimension Data's solution, Alexander Forbes has not only managed to reduce their first-time query resolution time, but they are also empowered with valuable information to ensure the effective management of their call centre.

Client Overview

Alexander Forbes is a leading provider of financial and risk services internationally with primary operations based in South Africa and the United Kingdom. A significant network of subsidiaries and partners ensures that the company provides an outstanding level of service to its customers internationally. Alexander Forbes' customers include small, medium and large organisations, specialist groups and individuals.

The company's call centre handles on average 30 000 client interactions a month. It consists of an estimated 30 agents servicing an estimated 1.2 million clients from its Retirement Fund and 40 000 clients from its Investment Solutions divisions. The call centre also services clients from the Financial Planning Consultants, Home Planning a small portion of its Risk Services divisions.

Business Challenge

Alexander Forbes's most critical challenge was to provide clients with more than one channel of communication to interact with their business.

"We wanted to implement a call centre solution to allow clients to interact with our call centre using three basic channels of communication namely, voice, fax and e-mail,"

says **Etienne Naudé, Chief Technology Officer at Alexander Forbes.**

Naudé continues, "It was a natural choice from our side to approach Dimension Data to assist us in designing a suitable call centre solution. We knew that their product knowledge and technical expertise would result in a solution tailored to our requirements."

Relationship History

Naudé comments on the relationship with Dimension Data and says,

"Standardisation and consolidation is a key strategic driver for us. This approach is not only limited to our technology platform, but also incorporates our procurement and partnership arrangements. As such, we have been outsourcing our IT operations to Dimension Data for the last 7 years."

During this time, Alexander Forbes has established a strategic relationship with the IT solutions and services integrator.

"Dimension Data has in-depth knowledge of Alexander Forbes enabling them to align their product and service offerings more strategically with our own business requirements," says Naudé.

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Etienne Naudé, Chief Technology Officer at Alexander Forbes.

Solution Delivered

Alexander Forbes had specific requirements for the call centre solution. The solution had to manage and route other non-voice communication channels the same way it normally handles and route voice calls, based on routing and other operational criteria specified by Alexander Forbes. In other words, call centre agents needed the ability to address a client's request in a uniform way irrespective of the communication channel chosen by the respective client.

Additionally, the solution had to be IP-based with the ability to integrate with Alexander Forbes's existing TDM PBX infrastructure. At the same time, it had to also be scalable to integrate with future IPT deployments/solutions, as well as to cater for decentralised agent locations.

To fulfil Alexander Forbes's requirements, Dimension Data proposed the Customer Interaction Center® solution from Interactive Intelligence.

“This solution is a standards-based, bundled communications software suite offering multimedia contact centre automation and enterprise IP telephony applications,”

says **Karl Reed, Solution Manager at Dimension Data.**

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How We Delivered

The solution was rolled out within a period of two months and managed by Dimension Data's project management methodology, titled Primer.

“The integration was seamless with minimal impact on our client services and processes,” says Naudé.

According to Reed, the rollout process kicked off with a workshop where the business requirements for the solution were defined. The technical design and documentation phases followed.

“The build phase incorporated the installation and commissioning of the solution after which configuration started based on Alexander Forbes's call flow design and requirements. This was followed by full user acceptance and a testing period,” says Reed.

Value Derived

Naudé comments on the functionality of the Customer Interaction Center® platform,

“The solution provides us with the ability to monitor and coach our call centre agents to be more effective and efficient in handling client queries. As a result, our client query resolution time has been reduced significantly.”

Additionally, all client interactions are now fully managed. Automated routing of client queries are handled in a uniform and standard basis, without having to unnecessarily pass calls onto the office.

“The solution also allows us to extract valuable information to identify additional client needs and requirements. In other words, we use the information to identify shortcomings in our processes and implement service improvement plans in a short space of time to ensure efficient interaction with our clients,” says Naudé.

Reed concludes that another benefit for Alexander Forbes is integration with their CRM workflow application.

“The Customer Interaction Center® integrates with Alexander Forbes's Quintus application which means that it is easy to track all interactions with clients.”



Alexander Forbes