

SERVICE REQUEST (SR) AND SLA MANAGEMENT SYSTEM FOR ONE OF THE UNITED STATE'S LEADING INSURANCE AND RISK MANAGEMENT COMPANY

KEY FEATURES

- Efficient internal management of the Service Requests queue by proper escalation of over due Service Requests
- In built templates to capture customer requirements.
- Sorting the SRs based on the categories and managing in a queue that follows pre-defined rules.
- Consistent and disciplined approach for client relationships management

CRM solution is implemented as a Service Request and SLA management solution. The CRM implementation mandate was to create Service Request from e-mails and web-forms; and send automated notifications. Keeping these client requirements behind, a robust platform for futuristic additions was delivered.

Industry Trends

CRM offered in Software as a Service model is the latest trend in the industry. The web based CRM applications are delivered as services over the internet, rather than on local network like conventional CRM software. More and more vendors are developing CRM software solutions for specific vertical markets.

CRMIT answers not only the vertical specific CRM requirements but also company specific requirements. Being world's leading CRMOD implementation partner of choice, CRMIT has successfully deployed CRMOD and web services to more than 30 customers across various verticals.

Business Problem

Client had a plan of consolidating three on-site support centers in the United States to one location i.e. to an on-shore location. This location would provide first level customer support. Off-shore location in India would provide support to on-shore location and for transaction processing.

Client traps all the customer queries and issues either through E-mails, Web-forms or through E-mail attachments. From these Services Requests are to be created in OnDemand so that the Help Desk Agent will be assigned to follow up. Apart from this client also wanted the OnDemand to be configured to match their business process.

The current system had posed the following major challenges for clients:

- Lack of an effective systems to track the issues and queries from various channels
- Improper monitoring and management of Service Requests by Help Desk
- Non availability of tracking metrics such as various reports and dashboards.

Solution Description

CRMIT offered a cost-effective CRM solution that brought both business and technical benefits. As a first step, CRMIT carried out a detailed study, analysis and understanding of the insurance and risk management process requirements of client. The standard CRM solution was customized and configured to suit customer's business needs. In addition, other customer specific features were developed using

SIEBEL CRM ON DEMAND)

web-services technology and integrated with the CRM system for complete business benefit. The below picture depicts the implementation of CRM On Demand along with web services integration.

SIEBEL CRM ON DEMAND

Comprehensive CRM for Maximum Results: Siebel CRM On Demand offers the most comprehensive set of sales, marketing, and service automation capabilities of any on-demand CRM solution.

CRMIT's SERVICE REQUEST MANAGEMENT SOLUTION

CRMIT used CRM On Demand as a 'Service Request Management Solution'. The new CRM assisted the clients to adhere to best practices, to incorporate business requirements and to streamline disparate business processes.

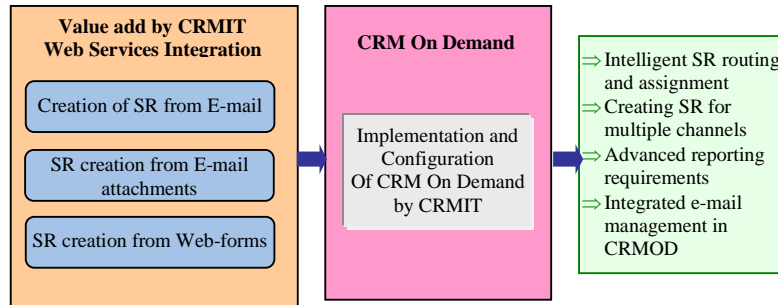


Figure i : System after CRM Implementation

- Creating Service Requests from multiple channels
- Advanced reporting requirements
- Integrated email management in CRMOD

Key Features

- **Workflows:** Well defined workflows and rules to automate the business process.
- **Reports:** Reports and dashboards for tracking and monitoring the quality of SRs.
- **Notifications:** Configurable and pre-definable escalation notification templates
- **E-mail Integration:** Capturing e-mail conversations from Outlook for future use.
- **Automatic Queue management:** Based on complex business rules SRs are moved to different queues ensuring the right people work on the SR at the right time.
- **SLA Management:** Handling multilevel SLAs for an SR is determined based on various parameters which could be Customer Type, Product, Issue Type and Customer's Priority etc.

Joint Value Proposition

CRM On Demand is a highly comprehensive and robust yet easy-to-deploy CRM solution. The success of implementation lies in working closely with the client and customizing the solution as per the needs and adding value through web services.

CRMIT used CRM On Demand as a 'Service Request Management Solution'. And made the Insurance and Risk Management process more visible and automated it to accelerate the productivity.

Contact Information

To know more about our products and services visit us at www.crmmit.com Or contact us directly contact@crmmit.com for further details.