

**CASE STUDY**

BETTERLIFE GROUP SELECTS PIVOTAL DATA TO MIGRATE CONTACT CENTRE TO THE CLOUD

For the BetterLife Group, a company that offers comprehensive financial solutions that include bond pre-approvals, mortgage origination, home services, and short-term and life insurance through its subsidiaries BetterLife, BetterBond and MortgageMax, the contact centre is the lifeblood of the business.

As Pierre van Lelyveld, CIO at the BetterLife Group explains, lead generation, customer engagement and cross-selling are pivotal components of the company's business model, which are functions primarily facilitated through the contact centre.

Time to overhaul

"When I joined the business, the group's contact centre capabilities were provisioned via an on-premise PBX system, which had, through the course of business, crashed. A short-term fix had been applied, which ensured the system limped along, but it was unreliable and inefficient," explains van Lelyveld.

He adds that the dialler system implemented in the call centre was, in his opinion, very expensive. "It didn't add the value we were paying for, so I decided it was time to overhaul our contact centre and back-office systems."

From the outset, van Lelyveld knew this was an opportunity to rip and replace the on-premise system with a cloud-based solution. "By adopting hosted contact centre and telephony solutions

we could negate the large capital expenditure associated with the hardware and installation of on-premise systems and shift these costs to an operating expense model."

BetterLife Group submitted a request for proposals (RFP) via a third-party bid facilitator, Torch Communications. During the RFP process, several businesses pitched, including Genesys, a customer experience company that offered its PureConnect all-in-one customer engagement solution built to support omni-channel customer service, powered by the Customer Interaction Center® (CIC) platform.

"Unfortunately Genesys only offered the CIC platform as an on-premise solution, which didn't meet the RFP requirements. However, they introduced us to Pivotal Data, an integrated managed services provider that could deliver a fully outsourced end-to-end hosted solution," he continues.

Compelling proposition

According to van Lelyveld, Pivotal Data subsequently won the bid based on the competitiveness of their pricing model – a fixed price for the duration of the contract, which meant no inflation-linked increases – and their proven track record, their technical competencies and their ability to provision a PureConnect CIC-enabled contact centre solution from the cloud.

Alan Macfarlane, CTO at Pivotal Data, explains that, following a full systems analysis, the company proposed a network agnostic solution hosted in the company's fully redundant Teraco data centre network.

"From our analysis, the team identified potential pain points, the most prolific of which was accommodating the client's multiple legacy networking and connectivity providers," he explains. Complicating the issue further was the fact that BetterLife Group was in the process of switching network providers.

"We spent a great deal of time working closely with the client, trying to solve issues that were outside of our domain, particularly where we didn't own the network. However, as Teraco offers a network agnostic hosted environment, we were able to address the challenge by aggregating the services and stitching them together in the background," continues Macfarlane.

Implementation commences

Following a further deep dive into the BetterLife Group's systems, Pivotal Data was able to begin the rip and replace project. "Armed with a definitive view of every technology layer in the business, it was clear that the contact centre and telephony systems touched every aspect of the client's business, from the network and applications, to the servers. We were therefore confident that the end-to-end hosted solution we proposed would solve many of the company's technology headaches."

“ Pivotal Data subsequently began work removing the on-site outbound PBX and contact centre and replacing it with a hosted in-bound and out-bound contact centre solution. ”

Ensuring a smooth, seamless transition with minimal downtime was demanding, especially due to the complexities of managing both the on-site and hosted environments.

"There were also a few challenges integrating our legacy systems, but Pivotal Data did their best to accommodate us during the process – they even went as far as loaning us a device to assist us in making the switch from analog to digital telephony," says van Lelyveld.

Overcoming challenges

"Integrating the auto-dialler system proved to be the biggest challenge initially," he recalls. "The main reason for this was that the configuration of the previous dialler was not well understood by the contact centre and was not copied across in the same manner. This meant consultants would sit and wait for leads to load."

However, Pivotal Data's team of engineers worked together with the client's technical staff to resolve the dialler problem, which then enabled them to expand into the back-office environment. "Next, we worked on the reverse integration of the group's existing home-grown CRM/lead management solution into our platform," continues Macfarlane.

Pivotal Data's open standards API made the integration easier and ensured it was ultimately successful. This helped to iron out a number of system inefficiencies, as the integrated solution was able to streamline data flow and improve workforce productivity by getting contact centre agents talking to consumers more efficiently.

With the integration complete, Pivotal Data scaled the solution country wide for BetterLife Group. "We now manage all the client's server and telephony infrastructure, and contact centres only run a soft-client with IP phones, as all the infrastructure lives on our platform in the Teraco data centre environment," explains Macfarlane.

Tangible benefits

Since the implementation, Pivotal Data has also taken over server application management functions and manages parts of BetterLife Group's network. "The redundancy we offer at a networking level, which has been built from the ground up and has always been part of our model, is vitally important from a regulatory and compliance perspective, as most BetterLife Group companies sell financial solutions."

More importantly, though, Pivotal Data has helped to enhance the group's business capabilities by giving the company access to a resilient and highly scalable omni-channel contact centre. "Since moving into the hosted environment, we've had very little down time as the platform and redundancies in place make it extremely stable," says van Lelyveld. "Any issues we have had have been network related. In addition, the voice quality of calls from the contact centre have also improved."

And by outsourcing the provisioning and management of their contact centre infrastructure to Pivotal Data, BetterLife Group has also decreased its expenditure on support and maintenance, delivering further cost benefits to the business, over and above the flexible, fixed-cost licensing model.

The solution's voice recording and cataloguing capabilities have also enhanced the group's operations, while meeting the stringent compliance requirements of the Financial Services Board. "Recordings are now easier to find and the cataloguing is more efficient and intuitive. This is not only important from a regulatory point of view, but improves responsiveness and resolution times for disputes or claims, which ultimately improves customer satisfaction," continues van Lelyveld.

Since the implementation, the group has also integrated a number of other solutions, which have all been far simpler since migrating to the cloud.

"They've also effectively future-proofed their business," adds Macfarlane. "BetterLife Group now has the ability to rapidly scale on demand to accommodate future business growth, and can easily adopt other technologies that could give them a competitive advantage, be it our unique embedded voice authentication capabilities, advanced Interactive Voice Response, skills-based routing or workforce optimisation tools. And this can all be implemented without the need for specialised in-house expertise and skills."

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