

Apex IT Helps Bremer Financial Get More Out of PeopleSoft CRM

Background

Bremer Financial Corporation's motto—"We see banking differently"—is no overstatement. Bremer is the only bank system in the world jointly owned by its employees and a charitable foundation. Through the foundation, much of Bremer's profits are ploughed back into the Upper Midwest communities it serves, and the bank remains true to the personalized community banking philosophy founder Otto Bremer articulated 50 years ago. In recent years, Bremer has expanded rapidly and diversified into a full line of financial services products. Today, Bremer has 1800 employees, 11 affiliates and 118 branch offices.

Growing help desk work load

Four years ago, Bremer implemented a client/server-based help desk application to keep up with growing technical support demands. The system supplemented a variety of manual issue tracking, escalation and resolution processes. For a time, the cobbled-together system served its purpose, but soon it began to buckle under the strain of increasing demand. If nothing changed, Bremer projected that two help desk agents would have to be added per year, perhaps indefinitely, just to maintain current levels of help desk service. Meanwhile, the help desk organization's abandoned call rate was topping 10 percent and the group was only meeting service level agreements negotiated with bank departments and affiliates 78 percent of the time.

According to Sherri Matuke, vice president, contact center manager, Bremer knew it needed a new help desk system that met at least two criteria. First, it had to be web-based to meet a corporate mandate to shift all applications and systems to the Internet. Second, it had to have a strong web-based self-service component to make it easily accessible to branch employees and reduce the load on Bremer's internal call center. PeopleSoft's 8.8 Enterprise CRM Help Desk and Self-Service modules easily met these criteria, but Bremer wasn't about to face the implementation alone.

"The PeopleSoft system is so comprehensive and has so many options, that if you want a quick implementation, you need partner who knows the system inside and out," Matuke says. "You also need a partner who can understand your processes and question the way you do things." Bremer found the perfect combination of PeopleSoft knowledge and business process experience in Apex IT.

"Couldn't have done it on our own"

With Apex IT's help, Bremer's PeopleSoft CRM implementation took less than four months and met employee and corporate expectations with flying colors—despite the fact that Bremer required more customization than anticipated and added requirements numerous times during the implementation.



Customer

Bremer Financial

Industry

Financial Services

Business Challenge

Replacing an overburdened legacy help desk system, numerous manual issue resolution processes and separate data repositories with a single web-based enterprise help desk and self-service system.

Apex IT Solution

- Business process re-engineering consulting
- Application Integration Methodology
- Post-implementation on-site support
- Ongoing project support

PeopleSoft Applications

- PeopleSoft 8.8 CRM Help Desk
- PeopleSoft 8.8 CRM Self-Service

Results

- Rapid implementation despite numerous customizations
- In-depth knowledge of PeopleSoft CRM and business processes maximizes benefits of software
- Enthusiastic employee acceptance of help desk Self-Service option, with usage growing 25 percent per month
- Greatly increased help desk capacity with no headcount increase
- Growing self-service support for nontechnical operational areas



Several elements contributed to the timely success of the implementation. Help desk agents were part of the design and testing phase, which helped ensure that the new system was based on user needs and easy to learn. Since PeopleSoft is already web-based, it was easy to reduce training costs to a minimum with “webinars.” A pilot program at an affiliate helped the development team solve problems before the enterprise-wide rollout. Matuke also credits Apex IT’s “honesty” with keeping the project on track. “They’re very straight-shooters,” she says, “and were very realistic about what we could and could not do.”

“We could have never done this on our own,” Matuke adds. “Apex IT was able to respond to all of our needs and get things done on time. More important, Apex IT understood enough about our business to help us

understand which processes could be incorporated in the PeopleSoft system and when it made sense to change things. That proved invaluable.”

Results

Bremer went live with Enterprise CRM 8.8 in July of 2003. It didn't take long for Bremer to start seeing results. The PeopleSoft Self-Service module was a hit among employees and is now used by 1400 of Bremer's 1800 employees. Nine-hundred self-service cases are opened and closed per month—a figure that grows by 25 percent per month. Meanwhile, Bremer has been able to handle an increase in help desk call volume from 1800 to 2700 calls without the need for additional help desk agents. First call resolution is an impressive 82 percent.

The increase in calls is largely due to the fact that Bremer has started to use the PeopleSoft help desk and self-service capabilities as a central data repository and knowledge base for operational, project management and technical questions. “We’re becoming the first point of contact for employees for all aspects of the business,” Matuke says. “Eventually, we want to extend the system to all Bremer departments and document any type of service request.”

As the last example shows, Bremer is seeing uses for its help desk that could turn it from a cost center into a strategic asset. Much of the credit for this goes to the fact that Apex IT helped Bremer so thoroughly understand the possibilities of the PeopleSoft software, Matuke says. “Now that we are seeing so many benefits, it’s become clear that we can use the system for a lot more than just a help desk,” Matuke says. “The opportunities are tremendous as we expand into our operations area.”



860 Blue Gentian Road
Suite 200
Eagan, Minnesota 55121
phone: 651.287.2820
fax: 651.287.2821
www.apexit.com