

Navigating the complex world of financial products:

RapportCMS™ helps one of the world's largest providers of life insurance, pensions and long-term savings and investment products.

At the time of our appointment our client was running its complex outbound sales campaigns across multiple outsourcers on multiple platforms. This meant the ability to compare on an “apples with apples” basis was severely impaired. It also meant that what was a core part of their business process was owned by outsourcers rather than by themselves.

RapportCMS™ was an attractive solution for this leading financial services player as it could deliver against the complex environment for scripting and campaigns, the ease of integration into several CRM systems and its ability to provide real time reporting for both local and international head offices.

Our relationship has now expanded significantly so that this organisation now uses 130 concurrent agents (“seats”). They use all aspects of system functionality and are able to expand or contract capacity as required. Of particular utility has been our ability to generate and modify product offerings quickly and efficiently.

Summary

This client now has the ability to manage multiple suppliers and sites from a common central platform, putting power back into their outsourcing relationships. As of September 2010, our client is interested in migrating the RapportCMS™ platform to more of their Asian markets for roll-out.