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CASE STUDY

AEON Insurance Service
optimizes call center operations
with Microsoft Dynamics 365

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Business Situation

AEON Insurance Service Co., Ltd. (AEON Insurance Service) provides insurance services – such as insurance sales and consultations – for its customers through locations within AEON-owned shopping centers across Japan. The company's call center helpdesk responds to inquiries from customers and employees regarding insurance products by phone and email.

"Until 2019, our call center was small and run by a very small team," explains Ms. Ryoko Yamaguchi, head of the customer support department, sales division at AEON Insurance Service.

In 2019, a call center transformation was created to centralize support functions, such as handling customer responses and paperwork, and increase the number of employees staffing it. As part of this process, AEON Insurance Service also considered upgrading its operations system. "At that time, the call center borrowed our parent company's network and systems for operations," says Ms. Yamaguchi. "Since we were ready for a migration to Windows 10 at the time, we decided to also build our own new call center system."

AEON Insurance Service began looking for a new system in January 2021. "We wanted our call center employees to be able to work from home in the future due to the COVID-19 pandemic," says Ms. Yamaguchi.

Genesys Cloud CX, from Genesys Cloud Services, Inc. (Genesys), was selected as the preferred cloud solution. The platform went live in April 2021, and the insurer began discussing how that could be integrated with the call center's CRM system.

"Linking the call center system with a CRM system has become commonplace in many companies," says Ms. Yamaguchi. "However, since we had been using our parent company's system prior to the introduction of Genesys Cloud CX, we couldn't integrate customer information due to compliance issues." Because of this, the customer database and call center system were separate. This led to issues such as an increased workload for employees and difficulty providing a consistent, multi-channel customer experience.

Solution

AEON Insurance Service began a project to integrate Microsoft Dynamics 365 CRM with Genesys Cloud CX. More specifically, the project was to develop a connector that could link the two systems. This required the support of an overseas-manufactured connector to be used for linking the two systems. However, since support for that was not available in Japanese, this caused some concern.

After exploring several connector development vendors that could support Japanese, the insurer selected Avanade. "Avanade had just developed the connector at that time," explains Ms. Yamaguchi.

"Linking Microsoft Dynamics 365 with Genesys Cloud CX has enabled us to easily create new customer histories. When forwarding data to another call center operator, the customer information screen is displayed, enabling a consistent customer response and improving customer satisfaction."

Ryoko Yamaguchi
Head of the Customer Support Department, Sales Division, AEON Insurance Service Co., Ltd.

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"We made a comprehensive decision, which took both flexible support and price into account. However, above all else, Avanade's extensive experience with Dynamics 365 and its reliability as a Microsoft partner were the largest deciding factors."

In just three months, the linkage connector was developed using an agile methodology and was ready by August 2021. After performing several tests, including operation verification, introduction support was provided in September, and the solution formally went live in mid-October.

Avanade manager Takashi Tajima, who was in charge of the development, says, "We advanced the project by sorting out the development priorities and through repeated discussions with AEON Insurance Service during the short development period to make the functions usable."

During development, the top priority was reliably linking the phone function to Genesys Cloud CX and allowing recorded calls to be quickly replayed to ensure consistency. By accessing recorded conversations, employees can easily share successful examples of cross-selling and other insights with their co-workers. Additionally, by making one response record for each call, the history is displayed in a pop-up window when a call is forwarded to another operator for a consistent experience.

Avanade created a user-friendly interface, providing call center operators with the ability to identify the corresponding customer when there are multiple incoming calls, and automatically retrieve their information. We also created a history registration screen that appears automatically when there is no customer information within the CRM. New histories can easily be created using voice data.

"During the development process, we had frequent meetings with Avanade's development team to fully discuss our requirements," says Ms. Yamaguchi. "They raised important points in every meeting and carefully managed the details, for which we are very grateful."

"We also maintained close communication with the vendor that implemented our Microsoft Dynamics 365 platform, as well as Genesys, so that we could divide the sphere of responsibility and resolve any issues for a successful project," continues Ms. Yamaguchi.

> "Avanade supported us with painstaking attention to detail, and the project proceeded well. Introduction support, which included training our employees, also helped us to begin operating the solution smoothly."
>
> **Ryoko Yamaguchi**
> Head of the Customer Support Department, Sales Division, AEON Insurance Service Co., Ltd.

Results

When it comes to the effectiveness of linking Microsoft Dynamics 365 with Genesys Cloud CX, Ms. Yamaguchi cites the ease with which an outbound call history can be created as being significant. Since the system is still new to the company, quantitative proof of this impact is to be verified.

For example, registering a new customer history used to be difficult. "Operators would sometimes forget to register a history, or a customer would call back during registration and be connected with a different operator who had no insight into the previous call," says Ms. Yamaguchi.

By linking Microsoft Dynamics 365 and Genesys Cloud CX, customer information can be retrieved using their phone number. Additionally, when a call is forwarded to another operator, the customer information screen is displayed and the new operator can easily check the history and provide a consistent response, increasing customer satisfaction.

Looking ahead, Ms. Yamaguchi says the call center wants to accelerate responses by sending important information to customers using SMS messaging. She also anticipates the deployment of an AI chatbot.

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Additionally, she states that the company will use data proactively and is hoping to obtain insights by analyzing the incoming call rate data gathered in both Genesys Cloud CX and Microsoft Dynamics 365.

Having gone through the COVID-19 pandemic, customers are feeling more comfortable with virtual, paperless interactions. The role of the call center has also changed, and there is an increased need to build a workflow in which consultations are provided over the phone and contracts can be completed online.

"Our company is still behind on digitalization," says Ms. Yamaguchi. "My vision for the future is that we'll build on the momentum of linking Microsoft Dynamics 365 with Genesys Cloud CX to improve our digital channels and optimize contract workflows. We improved the system that

had been developed to a certain degree ourselves. We are now considering creating a system from scratch, and would like Avanade to support us with an implementation plan for that project."

About AEON Insurance Service Co., Ltd.

Established in January 1990, AEON Insurance Service Co., Ltd. provides unique financial services, exercising "synergy with retail business" as an AEON Group company. In addition to operating 114 "AEON no hoken sodan (AEON insurance consultation)" stores (as of September 2021) – insurance shops for customers within the AEON Group shopping centers – the company sells individual insurance products across multiple channels and also offers corporate insurance products. www.hokenmarket.net

About Avanade

Avanade is the leading provider of innovative digital and cloud services, business solutions and design-led experiences on the Microsoft ecosystem. With 50,000 professionals in 26 countries, we are the power behind the Accenture Microsoft Business Group, helping companies to engage customers, empower employees, optimize operations and transform products, leveraging the Microsoft platform. Majority owned by Accenture, Avanade was founded in 2000 by Accenture LLP and Microsoft Corporation. Learn more at www.avanade.com

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