

Saga Holidays provides a broad range of travel services exclusively for people aged 50 and over. These services focus on those who have the time to travel at any time of the year and include special provisions for single travelers. Saga Holidays is a division of Saga Group which focuses exclusively on the delivery of high quality, value-for-money services for people 50 and over. These include holidays to worldwide destinations including cruises on their own ships, an award-winning magazine, insurance and financial products, and radio stations. The company has 3,500 employees and a customer base of over 2.8 million.

Why BPM

The holiday business was severely damaged by 9/11, the SARS epidemic and terrorism. These factors have contributed to a business slowdown resulting in 25% reduction of IT staff and a refocus on cost reduction. These reductions make individual productivity a critical issue.

Saga initially identified the most critical issues in the Customer Service department. Customers were not receiving the attention the company intended. Employees could not control or standardize the process, resulting in frequent bottlenecks. There was no transparency or visibility into each customer issue. Finally, while service standards had been developed, there were no controls in place to ensure compliance with those standards. The Saga team found it increasingly difficult to maintain their high standards of customer care.

Saga knew that BPM would help them cut costs and increase productivity. They were hopeful that it would also help them guide the activities of employees and the flow of information throughout the organization. The company further identified the need for automation of some tasks currently done manually, an automatic way to escalate certain customer issues and some controls on the time it took to finalize each customer issue. Finally, their customer database had been manually updated monthly. Saga understood that automation could update this information more frequently, with no human intervention.

Why Ultimus

Saga chose the Ultimus BPM Suite after a competitive evaluation. Seven vendors were identified, three were asked to demonstrate capabilities. Since the two overall goals of this BPM implementation was to improve efficiency and reduce the cost of business, each solution's deployment costs played a significant role in the selection process. Ultimus was chosen based on a favourable feature/cost ratio. Saga would be able to deploy the process they needed without a huge investment in new hardware; and on operating systems that their team was already familiar with.

Key Benefits

- **Reduced time to resolve customer issues – now 90% resolved in less than 14 days**
- **Same staff can now manage greater volume of incidents**
- **Improved control and transparency**
- **Fewer customer issues escalated beyond the Service department**
- **Established duties and escalation paths allow employees to be more proactive**

Deployment

An Ultimus partner trained Saga to deploy their own automated processes. The Saga team found that, because Ultimus development is very intuitive, they could develop processes themselves. Employees considered Ultimus easy to use for both process development and when participating in running processes.

The most difficult part of automating their processes was properly identifying and recording the process steps. This required the IT and Business Managers to walk through the process together and determine when the process could be improved, where steps could be eliminated and how each user interface could be optimized for peak performance by all process participants.

Over time every process evolves. For example, Saga's Customer Service process has been live for two and a half years and the company is now running version 3 of that process. This review/modification schedule is typical among Ultimus customers. A process is deployed and results in significant initial operational improvement. As employees use the process, they suggest further improvement, and, about once a year, the process owner will authorize some of those suggestions to be included in a new version of the process. In this way, Ultimus processes continually improve, to the greater benefit of the entire organization.

The automated Customer Service process is initiated by a customer service representative. Customer information from Saga's legacy database is automatically displayed to the representative. This system provides all of the information necessary to begin investigating an incident, increasing departmental efficiency. Finally, automated email notifications ensure that all involved parties are notified of the issue's resolution.

Results

Automating their business processes has garnered many benefits for Saga and its customers. Since automation, the time to resolve customer issues has decreased dramatically. Now, 66% of customer issues are resolved within one week, over 90% are resolved within 14 days. The company has also seen more general benefits. Customers and representatives both say that customer service overall has improved. Because the routing and escalation of each customer issues is now automated, each representative can manage a larger number of incidents faster. This means that the department can now manage a larger volume of incidents without an increase in resources.



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