

INNOVEER SOLUTIONS

Customer Success Story

COMPANY OVERVIEW

Almost every company claims to put its customers first, but Circles, the Boston-based provider of loyalty management solutions, truly does. Circles has revolutionized how corporations build life-long relationships with their customers and employees through its loyalty programs, which forge intimate relationships and drive increased profitability.

Circles' flagship product, concierge services, enables members to reliably complete simple, critical, and unique tasks, from event and vacation planning to relocation and business needs. The company also offers a broad family of incentive and recognition programs that allow clients to increase customer and employee loyalty.

THE CHALLENGE

With a widely diverse customer base, from airlines to financial services to consumer products manufacturers, Circles faces a unique customer relationship management (CRM) challenge. By offering its global clients a "private brand" experience via its own call center platform, Circles is transparent to its clients' members, who think they are dealing directly with Circles' clients. "When a customer calls one of our clients, for instance, we answer as if we are the actual company," says Deb Ryley, Vice President, IT, at Circles. That means Circles and its call center agents

must have access to a wide variety of customer-related information from its clients. "All of our clients are different," Ryley says. "We are very much like an ASP (Application Service Provider) because our clients come to us for a hosted Web site and call center solution. That means we have unique requirements for the single CRM platform on which we run."

Before moving to a market-leading CRM solution three years ago, Circles was struggling with a variety of customer-management issues, including the fact that the company relied on two separate home-grown CRM applications to serve its clients. These customer-management systems had grown organically, with different systems serving different clients, and they did not efficiently track what was happening with a particular member. This led to a lot of pain points.

"We had real difficulties in reporting and in knowing where our business was at any one time, and the systems were not able to scale with the growth we were experiencing. That meant we could not truly provide the best member experience. We were not able to provide our call center agents with a cohesive picture of what a member had experienced over time — that is, multiple phone calls and the other interactions we have had with them," she says.

Circles is a Boston-based provider of loyalty management solutions, including concierge, personal assistance, incentive, and recognition and relationship marketing services, to the Fortune 1000. Circles' flagship product, concierge services, enables members to reliably complete simple, critical, and unique tasks from event and vacation planning to relocation and business needs.

INDUSTRY:

- Hospitality and customer management
- Hosts and manages customer-facing call centers for Fortune 1000 customers, delivering concierge and incentive programs

GEOGRAPHIES:

- North America

PROJECT SUMMARY:

- Provided methodology and project management to design and develop world-class call center
- Performed system testing and management training for call center agents
- Deployed call center solution in two-part roll out, replacing home grown applications

OUTCOMES:

- Call center performance improved by 50 percent
- Employee-facing uptime and availability increased by 30 percent
- Increased confidence among prospective customers that Circles provides world-class support
- Infrastructure allows extension of call center to both customer systems, as well as third-party databases, for increased overall flexibility and functionality



THE SOLUTION

After deciding to implement a market-leading call center solution, Circles elected to partner with Innoveer Solutions to design and deploy the system. “We chose Innoveer for several reasons. For one, the team was local — located in the Boston area. More importantly, however, Innoveer was very strong on methodology and understood the structure Circles required. We had a new IT department, and our business needed the strong methodology Innoveer could deliver,” Ryley says.

“Innoveer came in with project managers, asked us the right questions, and was a strong cultural fit — not ‘suits’ from IBM or ‘geeks’ from a garage — and that was important,” Ryley explains. “And as a technical person, I appreciated the way Innoveer’s people listen to what I need without simply telling my IT department what and how to do it. They partnered with us and became part of our team.”

Innoveer worked with Circles to plan, build, and deploy its CRM system, as well as perform internal system testing before turning it loose on employees. They then spent time on user training, first with management — those who would be managing the call center — to make sure they knew how and why it worked.

Because Circles relied on two separate CRM systems prior to migrating to its new call center application, the company was able to roll out the new solution in two phases. “We started on one half of the call center floor using one system, to make sure it was the right system, and then we rolled it out to the other half. Our management team says it was one of the smoothest technology implementations they have ever seen at Circles. The business never missed a beat,” Ryley explains.

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Deb Ryley, Vice President, IT, Circles

OUTCOMES

“The world-class call center platform has been an advantage to Circles both internally and externally. Overall internal call center performance at Circles improved by 50 percent, and employee-facing uptime and availability increased 30 percent. Being able to capture the big picture is further enhancing internal efficiency and customer value,” says Ryley. “Not only did we surpass our desired outcomes, but the project was completed on time and under budget.”

On top of that, Circles has increased sales with major clients who recognize the company’s world-class infrastructure. “We could not have sold to some of our current clients if we did not have such a strong back-end system. The system has definitely helped us grow our client base because they trust that we have the infrastructure to support them,” she says.

From a forward-looking standpoint, the infrastructure will also help Circles support its customers in new and innovative ways. In this direction, Circles plans to extend its call center environment into its customers’ back-end systems, as well as other data sources. This business integration will allow Circles to merge data from multiple sources — its customers’ Web sites, telephone calls, and real-time eXtensible Markup Language (XML) data feeds — into the call center environment.

With this system in place, Circles will be able to, as an example, integrate data from outside sources such as dining, entertainment, and travel databases into its CRM system. That, in turn, will enable Circles to better meet the ongoing demands of its clients.

