

CSF International

Payments Provider Gets Fast Payback on Digital

Business Overview

CSF International (CSFi) is a global provider of electronic payment authorization and transaction switching software. The company's solutions provide services to hundreds of companies in over 20 countries, and support thousands of ATM and point-of-sale terminals worldwide. Clients range from community banks to multi-bank holding companies and processing centers.

Challenges

CSFi was using a variety of methods and systems to manage their business. Sales people tracked their leads and contact information in Excel spreadsheets; business support and operational data were held in libraries of Word documents; and license information was stored in a Microsoft Access database. They used Microsoft SharePoint for items shared by multiple processes, such as project tracking and customer conversions. Lastly, they were using RightNow to handle the incoming support calls.

Philip LeMaster, IT Operations Manager, recalls, "Information seemed to be scattered everywhere. It wasn't cohesive and it wasn't being kept up-to-date. The sales, marketing, support, and development departments

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— Phil LeMaster,
IT Operations Manager

each had their own particular access to customer, contact, licensing, and support ticket info, but without a coordinated system, data was often duplicated and out of sync." It often took hours to obtain

detailed information on nearly anything, and at times they just looked through paper files rather than try to figure out how someone stored information on their own personal system.

At first, CSFi only wanted to replace RightNow with a less expensive call center solution. "We were using RightNow Web, a hosted service,



Industry

- Financial Services

Challenges

- Scattered information
- Stale and duplicated data
- Difficult to make changes
- Fee for exports
- No customization
- Expensive annual contract

Agiloft Solution

- Document/contract management
- Customer support
- Project management
- Change management
- CRM—sales automation
- Account management
- In-house Microsoft server solution

Benefits

- Cost savings
- Faster response to tier-one customers
- User-friendly
- Improved efficiency
- Better reporting
- Increased sales opportunities

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and management wanted something in-house that was less expensive and could be managed internally," said LeMaster. He supported that decision. "We had been dealing with an awkward interface and restrictive functionality for some time." Key issues included having to go to RightNow to make even simple changes like adding staff users; they couldn't create frequently asked question (FAQ) pages; and exports had to be done through RightNow, for a fee. There was no real customization available. They couldn't add fields to tables for a more accurate portrayal of their business model.

If CSFi was going to replace RightNow, they needed to do it fairly quickly before their support contract came up for its annual renewal.

The Search

LeMaster reviewed five different products in looking for a flexible Windows-based customer support solution that could function well within a financial services environment. He also interviewed other companies to find out what they had done in similar circumstances. Agiloft stood out because it offered a complete package of applications, including sales automation and contract management, and customer support, all of which could be customized to fit CSFi's financial business model without having to write any code.

After a thorough testing of the trial database provided by Agiloft, LeMaster knew he had found the right product. "Agiloft had the improved functionality we needed, a better look-and-feel, and the cost was within our budget: the purchase price was less than what we were paying for just one year of hosted service with RightNow." The big plus was that Agiloft also provided a way to tackle the even bigger issue of all those disparate systems, something that they hadn't even considered prior to starting their search.

Agiloft Solution

CSFi's first used Agiloft was to manage their customer support tickets. Converting to the new application was easy because of Agiloft's flexible data model. Once they obtained their data export file from RightNow, LeMaster simply used the import wizard to map fields from the export file to fields in the destination tables within Agiloft. Testing out the solution took a few weeks more due to the sensitive nature of financial data; it was important to make sure the new features they had added were performing as expected.

LeMaster also had to set up training for the staff so that they could learn the new system. Still, everything was up and running before the expiration of their support agreement with RightNow.

"Agiloft's pre-configured applications made it easy for us. We just took the support application out of the box and added our own customizations without having to write a line of code," said LeMaster. New fields were added to the basic Tickets and Companies tables to more accurately reflect the multi-tier aspect of their support offerings. They also added a fully integrated frequently asked questions (FAQ) page so users could get answers to the most common questions involving the support system without having to send a separate email or try to reach someone on the phone.

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They also added additional support options. When a customer with 24-hour support creates a ticket after hours and reports that their system is down, an

automatic text message is sent to the support staff and everyone in customer service is notified by email.

As one can imagine, the security of the data environment in a financial company is of utmost concern. Customers of CSFi include data centers that process multiple banks as well as the individual banks. In most cases, the data center creates the customer support ticket, but the banks have the option to create support tickets themselves. When that happens, a copy of the support ticket is sent to the data center so it knows that one of its customers is requesting help. Individual banks also have limited views of fields and tables compared to the data center. The same scenario applies to resellers which support multiple banks. The banks can submit support tickets and the reseller is notified of the ticket.

One of the CSFi's initial concerns in moving from a hosted to an in-house environment was how much work was going to be required to maintain the system. With Agiloft, the entire system can be backed up and re-installed within 90 minutes. CSFi now creates exports of their knowledgebase any time they please, without having to pay a separate fee. The Agiloft XML-based export file format preserves all of the contacts, tables, look-and-feel, customizations, business rules, and scripts. Once an export is complete, they upgrade their installation by simply downloading the latest release and running the same program that they used to install it. It's just as easy to move the installation to a new system: they create an export of the knowledgebase, install the software on the new machine, and then import the database — all in less than two hours.

Improved Business Functionality

After the success of the initial customer support application, LeMaster's team decided to tackle the problem of duplicate and stale data by implementing additional Agiloft modules.

They eliminated the sales data scattered about in spreadsheets, took all of the licensing information out of Microsoft Access, and discontinued the use of SharePoint. All of these data sources were incorporated into the same knowledgebase, with access to the information managed by permissions. Although this presented a much more complex use case, the implementation strategy remained the same — they took the default applications and customized them to fit their needs without writing any code.

"The financial services environment presents a complex use case scenario — we really pushed the envelope of what could be done," said LeMaster. "I really have to compliment the support staff at Agiloft. I dealt with the same implementation specialist each time I needed assistance without having to explain our business model each time."

One addition was a new table called FDIC Summary of Deposits that has data from all of the US banks imported into it. The table is linked to the Companies table so when a staff user looks at the company record for a bank, they see all yearly deposits from the FDIC. Now they can easily see if any of their customers had increases in assets, and bill them accordingly.

CSFi also took advantage of the business rules engine within Agiloft to create rules that automatically check the License table five days before the end of the month, determine which customers' licenses are coming up for renewal, and then alert the sales team by creating tasks in the Task table.

"Agiloft far surpasses any competitor's system!"

— Phil LeMaster

Another customization came from the sales team, who didn't like having prospects and opportunities in different tables. These were combined into one table and new fields were added to give the team a more

complete view of their sales targets. LeMaster adds, "Agiloft is so flexible and adaptable, you're truly only limited by your imagination."

CSFi's use of Agiloft now includes customer support, project management, contract management, change management, sales automation, and account management. LeMaster says, "Agiloft far surpasses any competitor's system!"

Benefits

- **Huge Cost Savings** – The purchase price of Agiloft was less than one year of support with RightNow Web, and the annual support from Agiloft is equally affordable.
- **Faster Response to Tier-One Customers** – Texts and emails are automatically sent to the appropriate staff when customers with 24-hour support report their systems went down.
- **More User-Friendly** – Interactive FAQ pages provide timely answers to customers without having them waste time making phone calls or sending emails.
- **Improved Overall Efficiency** – Sales, marketing, support, and development personnel now work off one common database. No one wastes time looking through someone's individual data files to get the latest information on a particular person, bank or data center.
- **Better Reporting** – Reports and dashboards are easily configured to provide up-to-date information on support tickets, sales opportunities, and licensing details.
- **Increased Sales Opportunities** – Sales people can now see if a bank has had an increase in assets over the previous year and bill them at the correct rate. License renewals are now handled more efficiently, with automatic reminders given a week in advance.

About Agiloft, Inc.

4-Time winner of PC Magazine "Editors' Choice Award" and Spend Matters "Value Award", Agiloft is heralded as "the most customizable contract management system on the market". Our agile technology makes it easy to setup and use and the scalable platform supports any approval processes with integrated workflows, email alerts and one-click contract generation. It is fully audit compliant with support for HIPAA, SOX, and CFR21.

About Koho Software, Inc.

Koho is one of Agiloft's top rated partners and specializes in selling, implementing and training on Agiloft's contract management and business automation solutions. Our best practice consulting ensures rapid deployment and a fully extensible system. To learn more visit us at: www.kohosoftware.com