

CASE STUDY

MEMBER DRIVEN

AAA Western and Central New York Improves Member Service and Gains a More Holistic View of Every Member with Pivotal CRM





AAA is one of the United States' most respected organizations and recognized brands. For its millions of members, AAA membership represents peace of mind. Having built on its core offering of emergency roadside assistance to provide travel services, insurance, and financial services that extend well beyond just the automotive realm, today AAA gives members that same peace of mind across its many offerings.

CUSTOMER DETAILS

AAA Western and Central New York

Provides auto and homeowners insurance, roadside assistance, travel information and booking, financial services and member discounts

INDUSTRY

- Insurance

SOLUTION

Aptean Pivotal CRM

CHALLENGES

- Transactional systems and manual processes were not effective
- There were data inconsistencies and inadequate reporting

BENEFITS

- Reduced call times, increased productivity and integrated with marketing
- Increased documented member feedback by 45%

AAA Western and Central New York (WCNY) is among the larger of AAA's 41 individual Clubs nationally, with more than 880,000 members. Stretching from the Canadian border south to Pennsylvania, AAA WCNY covers approximately two thirds of Upstate New York with its 14 travel and Insurance branches staffed by 170 front-line associates, as well as 4 call centers with 200 associates answering member calls at any point in time.

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Lesley Lannan

Vice President of Member Experience

You might not think an organization such as AAA WCNY would have a problem with member satisfaction or retention, and you would be right. Over the course of its 110 years operating in this region, AAA WCNY has built strong member relationships and trust equity. The association boasts high member retention and satisfaction rates that would be the

envy of many other businesses and associations. But that's not enough to make AAA WCNY rest on its laurels—it's continually striving to enhance its member service and relationships.

For Lesley Lannan, Vice President of Member Experience, the idea of being a “member” implies more than just being a customer. “That simple delineation of membership implies an intimate relationship,” she explains. “Our members don't just pay for service; they belong to an organization. Many people still call us the Auto ‘Club,’ which means that we're in this together.”

FROM TRANSACTIONAL TO MEMBER-FOCUSED

To ensure that members enjoy outstanding experiences, AAA WCNY is committed to equipping its associates with the knowledge, skills, orientation, and technology resources to understand the importance of their relationship with their member-customers and deliver experiences to match. As part of this initiative, AAA WCNY sought out a robust customer relationship management (CRM) system— or, in their case, a member relationship management system they call MRM.

Until recently, many of AAA WCNY's member interactions were heavily reliant on manual processes and transactions. Members received the personalized service that comes from being served by experienced, dedicated associates, but the manual nature of the interactions came with drawbacks. Member information was often logged in scattered notebooks, file folders, and post-it notes, rather than a centralized database. This also rendered it accessible to only one associate, so if a member called or came back into a given office to discuss travel plans they had formerly broached with an associate, if that associate was not available, they would have to start over with a new staff member.

Furthermore, only actual transactions were recorded, not the many non-transactional interactions and exchanges that often take place with a member before a transaction and help build the relationship. In addition, AAA WCNY didn't have

a systematic way to capture feedback and suggestions, whether positive or negative, so it did not have the information it needed to determine how best to serve members and improve the member experience. And as an organization that processes more than 1.5 million member interactions through its call centers, 800,000 through the Web, and 600,000 through branch visits every year, even small inefficiencies add up quickly.

“We wanted to be at the next level in our dealings with members,” explains Bob Leach, CIO. “We felt that we could do a better job by having a tool that would serve up to our front-line associates the complete view of the member. But also, we didn’t always necessarily have the right visibility into our pipelines, and just as any other organization, we wanted to figure out how to be more efficient in serving our members without giving up any of the effectiveness or intimacy.”

David Gevanthor, Vice President of Travel, adds, “The pre-existing systems were very transactional, so we knew how many TripTiks we did and how many travel packages we sold in a year, but we could not relate them well to the membership as a whole, nor could the individual lines of business see the other activities that the member was engaged in. The overarching goal was to provide a higher level of service for the member regardless of business line.”

To achieve this goal, AAA WCNY looked for a member-centric software solution that could support advanced workflows to help associates in the call center and branch offices consistently capture information and serve members. They chose Pivotal CRM from Aptean, in part because of its superior ability to integrate with the association’s transactional systems.

Explains Gevanthor: “When somebody is broken down by the side of the road, there’s the initial call to the call center, but over the next 30 or 35 minutes, you’re giving them status updates, so it’s really critical for us to have real-time integration from our transactional systems into the membership system.”

“Pivotal CRM gave us the best integration platform to build off of,” adds Leach.

AAA WCNY considered software-as-a-service CRM solutions, but ultimately opted for Pivotal CRM’s on-premise solution. “What you quickly discover with the software-as-a-service vendors is that if you want to introduce unique workflow around their product and the business logic that entails, their solutions tend not to do that particularly well,” explains Leach.

Aptean’s services organization was also a differentiator. “We wanted a partner that had a strong services organization that could deliver a turnkey solution to us,” says Leach.

For Lesley Lannan, the top MRM selection criterion was ease of adoption. With a workforce accustomed to less-computerized member interactions, she knew they would need a system that was easy to use and integrate into users’ daily work routines. For this reason, Lannan notes, “Pivotal CRM’s interface with Outlook was very appealing, because that made it easier for people to learn one new system instead of two.”

MAKING IT THEIR OWN

Having selected Pivotal CRM, AAA WCNY had the system they needed, but they knew that adapting it to their specific environment would be critical to its success. To ensure effectiveness as well as user adoption, AAA WCNY needed to fit the system to the way their associates worked—something that was not very well documented in the branch offices at the time. They took the time to work closely with staff to document and refine work processes before modeling these in the system.

The flexibility of Pivotal CRM and its workflow tools proved invaluable in supporting this process. “A lot of service systems are so prepackaged and don’t work with our particular set of workflows, products, services, and so forth,” says Lannan. “We found that Pivotal CRM really lent itself to customization and to our workflows.”

AAA WCNY also realized that a major factor in the success of the MRM implementation would be the effectiveness with

which AAA associates were informed, trained, and engaged in the project. Working with Apteian, on the initiative that they internally branded as Member Focus, they devised an in-depth communication plan 14 months prior to the system roll-out that involved multiple steps and mechanisms, from online learning tools and resources to games and contests. Taking the time to document and model workflows and effectively train associates in the use and value of the system has paid off for AAA WCNY and the 470 users who use it every day.

“We ended up with a product that is highly refined,” says Lannan. “When new people join our organization, they tell us how intuitive it is and how easy it is to use, which gives me a lot of confidence that we made the right decision.”

CIO Bob Leach is especially happy with the way workflows are now supported in the system. “Because we took a workflow approach, we have been able to replace anecdotal discussions with fact-based ones,” says CIO Leach. “This also allowed us to better coach each layer of the organization in how to better serve the member.”

ENJOYING THE RESULTS

The impact of the CRM project at AAA WCNY has been significant.

“Pivotal CRM has really changed the fiber of our workforce and our daily interactions,” says Gevanthor.

Previously, due to AAA WCNY’s decentralized nature and multiple business lines, when a member called or came in, the associate did not always have the knowledge of the member’s background to help them effectively. Says Lannan, “With Pivotal CRM, it’s now a keystroke. No matter who picks up the call in the contact center or who is at the reception desk in the branch or who gets an e-mail inquiry, they have the opportunity to understand that member’s orientation and meet their needs. Members are going to find us much more able and prepared to be relevant to their inquiries and concerns.”

Better member information and tools from Pivotal CRM have made AAA WCNY associates more productive.

“With Pivotal CRM, it’s much easier to update information, document member concerns, and research their inquiries,” says Lannan. “It’s made our associates’ work much more focused and efficient.”

While the implementation is only a few months old, Lannan sees its impact already, attributing a strong recent quarter jointly to effective management and the CRM system. “We’re in a much better position to manage associates’ leads, as well as their subsequent follow-up and qualification,” she says.

Benefits of the system to date include increased associate productivity, reduced call times, increased conversion of member interactions into member transactions, and an increase in recorded member feedback items—a 45% increase over the same time the previous year, before the system was implemented.

With the system, AAA WCNY also has greater visibility and coordination across its multiple business lines. Says Lannan, “Using Pivotal CRM, we now have much more consistency and opportunity to communicate across many different business units.” Over time, this will help AAA WCNY find opportunities to help members access a broader range of products and services.

Associate satisfaction and retention correlates closely to the member experience, and is therefore another important benefit for AAA WCNY. The associates themselves are certainly seeing the value of the system. “They’re very appreciative that they don’t have to rely on word of mouth for transmission of information,” says Lannan. “There’s nothing more concerning in a call center than an associate standing up and waving, trying to get assistance on a complicated call. We now have so many more tools for people at the front line. What I hear from associates is that they didn’t realize until now that their occasional feelings of inadequacy in dealing with members were due to not having the right information available to them. The system is addressing that kind of frustration on the front line. I expect a reduction in turnover and training and recruitment costs, and that goes right to the bottom line.”

The ultimate success metric for AAA WCNY is member retention. And while retention figures were already enviable

to begin with, the association is confident that their system will positively impact this metric. They also expect that as they raise the performance bar on their core services and deepen member relationships, members will turn to them for additional services such as travel and insurance, generating higher revenue per member—revenue that, as a not-for-profit corporation, AAA WCNY is able to put right back into delivering more and better services to members.

INTEGRATING MARKETING COMMUNICATIONS

The implementation of Pivotal CRM has also been very effective for AAA WCNY in closing the loop between marketing communications and member service.

Formerly, if a member called in responding to a promotional offer, the call center associate was often unsure which of many possible offers the member was referring to. AAA WCNY now stores the marketing literature and communications right within the system, enabling associates to instantly call up a copy of any promotion recently sent to that member and launch instantly into an informed discussion of it with the member.

“From the call center perspective, this represents two big wins,” says Gevanthor. “First of all, being able to pull up the right piece of marketing literature that the member’s inquiring about creates a much more professional, more satisfying interaction. But secondly, what that actually translates to is productivity, because associates aren’t spinning their wheels

trying to guess at which of the multitude of publications the member might be referring to. So with Pivotal CRM, we get both increased quality on the member’s side and productivity on the associate’s side.”

THE ROAD AHEAD

Member Focus is an ongoing objective for AAA WCNY, so the project will continue to grow and evolve over coming months. AAA WCNY is continually looking for ways to refine and improve the system and its workflows. Plans include development of more extensive reporting for mid-level managers, increased use of member intelligence to enhance database marketing efforts, and deployment of a new telecommunications platform with computer-telephony integration (CTI).

With the success of the first phase of implementing Pivotal CRM, early planning is also underway to bring several business lines that were not part of the initial roll-out onto the system, which will come closer to giving everyone in the business the 360-degree view Pivotal CRM offers its current users.

Finally, as AAA WCNY looks to the future, it sees continued innovation, guided by the increased member feedback and knowledge the system has made possible.

“Pivotal CRM will be our compass to identify what we should be developing next for our current and prospective members,” says Lannan. “The result will be more innovative products.”



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