



Sector_ **Banking**
 Title_ **The implementation of an e.piphany suite: Marketing Outbound, Commercial Agenda and Client Files.**
 Date_ **March 2007**

everis has worked closely with Banco Gallego on the development and implementation of the commercial Client Files, Commercial Agenda and Campaign Manager tools included in the e.piphany suite.

The most important goal of this project was to enable internal compliance with business objectives and improve client management.

The implementation of this project meant moving from the use of non-integrated, difficult to evolve in-house tools to a single solution that included a variety of integrated tools that could be parameterized pursuant to institutional requirements.

This implementation had to be aligned with the Banco Gallego focus on continuous technological evolution and service improvement strategies.

Javier Sancho Pelechano
 Director, Banco Gallego Technology and Systems

“This project has meant a change in philosophy within the institution with regard to our client relationship model. It provides us with tools that allow us to have a better understanding of each and every client in order to be able to offer them products that are better adapted to their real world necessities. This is also the first step towards the implementation of an individualized offering based client management model that will be defined by how client needs fit with certain pre-established profitability goals.”

Commercial Activity Optimization:

The **commercial network** required an integrated system (Client File and Commercial Agenda):

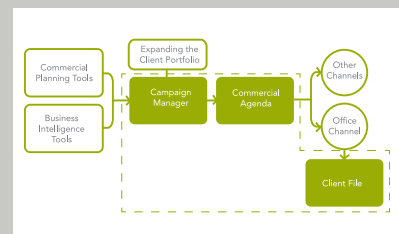
- Capable of displaying the comprehensive position of bank clients as compared to the partial views offered by various other tools.
- Having a commercial focus that would include the most important commercial indicators for each client.
- Capable of assuring and controlling commercial activity and keeping it aligned with established business objectives (using commercial activity prioritization plans)

Aligning Commercial Activity with Institution Objectives:

The **marketing area** required a system (Campaign Management) that:

- would allow for the carrying out of commercial campaigns using different channels, paying special attention to the Office Network commercial channel.
- would allow for the carrying out of multiple criteria target public selection campaigns in a simple and flexible way.

- would automatically set commercial activity priorities pursuant to pre-established parameters (budgetary compliance, temporary solution cost, client propensity scoring, etc.) and allow for varying said parameters in a flexible and dynamic way so that results can be adjusted to objectives.
- would provide information on commercial activity for later analysis.
- would include tools that allow for having a better understanding of bank clients and establishing behavior patterns that could act as a base for improved product designs and campaign planning.



The solution developed has been integrated into an overall commercial business and management plan that represents one of the most important challenges to be faced by Banco Gallego in the past few years.