

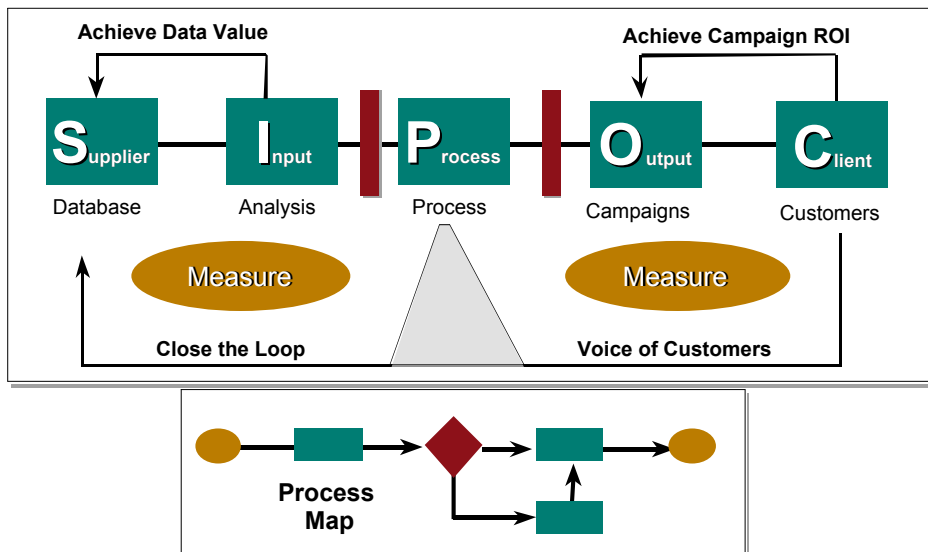
Marketing Process Improvement Case Study

For one of the top 5 leader in financial industry CALISO aligned business processes with customer’s requirements and automated Customer Relationship Management (CRM) to allow them to perform direct marketing campaigns and customer support as required. Marketing management system was NOT effective. Output of current processes did not meet requirements critical to customers.

Caliso applied the DMAIC and PM methodologies to develop, implement, operate and refine the marketing process(es). The company wanted to bring all customers requests into a streamlined process to bring satisfactory and timely closure to any campaign and customer’s request. We also assessed potential systems effectiveness of IT to implement key CRM solution.

Customers expect consistent professional services and support with every interaction through any channel from anywhere in the world. The quality of an organization’s customer service is often a competitive differentiator and critical to success in the financial industry for retaining customers. We select Siebel CRM solution to build relationships and deliver consistent world class services while driving down the total cost of ownership through greater productivity and reduced costs. The new workflow marketing was as follow (*):

Marketing Model Six Sigma Best Practice



*A business process is a serie of activities to achieve a specific business objective.
 A best practice is a proven methodology to effectively achieve a business objective.*



CALISO Consulting, LLC
1516 Oak Street, Suite 312
Alameda, CA 94501

() CRM Marketing Model Six sigma Best Practice, by Franck Ardourel, Consultant Six Sigma.*

Caliso successfully refined the marketing business model and integrate the CRM system providing the company with the ability to poll customer's preferences for up-selling and cross-selling strategies, perform direct marketing campaigns, support customer request from inception to satisfaction, lead loyalty credit-card program, and develop co-branded and partnership alliances for rapid expansion on the financial market. As a result, they consolidated their market share position.