ČSOB Pojišťovna

Consolidation of distribution networks in ČSOB Pojišťovna – migration of the Contact Center to Salesforce

Product: **Service Cloud** | Industry: **Finance**

Challenges

- Ending IT support of the existing CRM application
- Slow response time and instability of the system in call center operations
- Integration of the contact center into an already functioning solution for other distribution channels

Lucie Brandová
Head of Client Call Center
ČSOB Pojišťovna

„With Salesforce, our contact center is faster, more stable, and clearer. Thanks to pilot users and the gradual rollout, the team adopted it without any issues."

Initial situation

The contact center of ČSOB Pojišťovna was struggling with expiring IT support and instability of its CRM application, which prolonged client servicing and put pressure on agents. In a call center environment, where speed and reliability are key, it was necessary to choose a new solution that would meet these needs.

Project goals

- Replace the existing system with a stable and responsive solution
- Unify access to customer information in a single system
- Connect the new CRM with the on-premise Genesys telephony platform shared within the ČSOB Group
- Ensure smooth adoption without impact on clients
- Create a foundation for further development and AI adoption

Technology choice – why Salesforce

Salesforce was already used at ČSOB Pojišťovna in other distribution channels, which made extending it to the contact center the best choice and a further step toward building one CRM system for the whole company. Another important aspect was the ability to integrate Salesforce with on-premise Genesys telephony and the possibility of further low-code/no-code development.

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Benefits

- Faster and more stable work of agents
- Adding another distribution channel into the existing Salesforce solution at ČSOB Pojišťovna
- Effective adoption through gradual rollout and support of pilot users
- Integration with the on-premise Genesys telephony platform shared within the ČSOB Group
- A foundation for future development in the form of sales process support and AI adoption

„The integration with Genesys and unified access to information significantly accelerated the work of our agents and improved client service.“

Lucie Brandová
Head of Client Call Center
ČSOB Pojišťovna

Key project characteristics

- **Implementation in 10 months –** from detailed analysis to production launch
- **Gradual onboarding of 30 agents –** without negative impact on the daily operations of the contact center
- **Integration with Genesys –** connecting Salesforce Cloud with on-premise Genesys

Implementation partner selection

Enehano was chosen for its experience with numerous Salesforce implementations, including in the area of contact centers, and its long-term cooperation with the ČSOB Group.

Výsledky projektu

The introduction of Salesforce for the contact center delivered a **faster and more stable environment for agents and more efficient client service**. Thanks to the **gradual rollout and involvement of pilot users**, the entire **team adopted the system effectively**. **The system is ready for further development,** such as sales process support or the use of artificial intelligence for call transcription and analysis.

Case study online

Have a question? Contact us