



CAISSE DES DÉPÔTS

TESTIMONIAL

Raymond Bourdais, Manager of the customer self-service unit
Richard Poumerol, Manager of the digital information
and customer experience unit



The Caisse des Dépôts has fulfilled the role of manager, under a mandate from social organisations that include public pension schemes in France, since 1816. Management of pensions and benefits by the Caisse des Dépôts now includes 48 mandates in the area of social security

Covering:

75,000 public sectors employers
7.5 million contributors
3.5 million pensioners

Customer relations management within the overall management of pensions and benefits by the Caisse des Dépôts promotes self service and a reduced amount of human contact related to frequently asked questions through the use of a chatbot.

Dydu : What is your role within your organisation?

The management of pensions and benefits by the Caisse des Dépôts is organised on two sites: Angers-Paris and Bordeaux. Each of these has its own Customer relations management service.

The role of the «Customer self-service» unit in Angers is to promote customer autonomy through the technical means available online. **Encouraging autonomy means providing every possible way for the customer to find the information or service required without having to call a customer relations operator.**

In customer relations management, within the scope of pension funds managed by the Bordeaux site, the aim of the «Digital information and customer experience» unit is to set up a digital

information service for active and retired members that is as comprehensive and simple as possible.

What are the challenges with regard to customer relations in your organisation?

We have 3 types of customer. Employers, active members and retired members. Our customers expect information that is objective and simple, as the world of pensions is a complex one. We also have a duty to be transparent. In order to facilitate communications, **our services must be available and we must listen to our customers.** Trust and service are of vital importance for us in our capacity as providers of a social service. We are working on a very industrial scale but every individual request must be taken into account.

It is also our duty to be considerate, in other words to adopt a proactive and helpful approach. In simple terms, we have to put ourselves in the customer's position and defend his or her interests. **Putting ourselves in the customer's position also means meeting his or her expectations in a very responsive way.**

As a public service, we must respond in the same way to all our customers, both in France and in the various overseas countries, departments and territories, 24 hours a day, 7 days a week.



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Due to the size of the population we serve, our customers are in almost constant touch with us or contact us via our websites.

One of our biggest problems concerned accessing private spaces. We were receiving a lot of hotline communications from our employer, active or retired member customers who were experiencing problems either registering or accessing their private space.

REQUIRED SOLUTIONS AND EXPERTISE

What solution(s) and expertise had you considered to meet these challenges?

We came up with the idea of adding a chatbot option, as we had noticed that other large groups were using this procedure on their websites. Specialist magazines were also reporting the benefits of a virtual operator on web pages. In addition, we felt that **having someone constantly there to answer or ask questions would be reassuring for our customers.**

What were the solution's development stages?

It was a gradual process. In the 1st phase, we placed Ariane in the textbox for accessing personal spaces. A few months later, we also introduced a chatbot to the websites of CNRACL (Caisse Nationale des Retraites des Agents des Collectivités Locales - National pension fund for local public sector workers) and Ircantec (Institution de retraite complémentaire des agents non titulaires de l'État et des collectivités publiques - Additional pension organisation for non-permanent state and public sector workers).

With the help of Do You Dream Up which implemented the solution and developed the structure and training, we were operational in less than six months.

What benefits have you observed?

Ariane first officially responded to internet users on 11 January 2013. Since Ariane has been online, we have had an average of 11,600 conversations per month with a **success rate of 85%.**





550,000 conversations since January 2013
85% response rate

“ Thanks to our virtual assistant Ariane, we have reduced the amount of human contact related to frequently asked questions. This was our objective and it has been achieved.

Customer feedback has been positive and managers are using the chatbot more and more.

CHOICE OF PROVIDER

Why did you choose Do You Dream Up?

We chose Do You Dream Up chatbot because this solution seemed to be the most simple and user-friendly to implement

How did the Do You Dream Up team support you for this project?

Do You Dream Up supported us from the start of the project and throughout the entire course of its development. This

was convenient for us operationally and enabled us to go online with the project very quickly.

From our perspective as a customer, **Do You Dream Up is always available to answer our queries. Our suggestions for improvements were taken into account and this also helps with the development of AVI.**

KEY SUCCESS FACTORS

In your opinion, what have been this project's success factors?

Internally: dedicated teams for the development of the chatbot on each website, together with regular follow-up of conversations,

With regard to the service provider : Do You Dream Up teams that are responsive and extremely competent.

AND IN THE FUTURE...

What changes are you considering for your digital customer relations services? Are you planning to

broaden their scope?

To date, the services provided by Ariane have related only to general questions and those dealing with private spaces. We now hope to extend her assistance to personal questions, for example providing pension totals for retired members or the number of quarters already gained for active members.

How do you see customer relations evolving in the coming years?

The world of pensions is changing, as is internet use. We have a duty to provide all our services in a simple digital way, which will allow us to optimise our organisation in order to meet these new challenges.

With the proliferation of smartphones and the constant use made of them by the current generation, the future of chat looks rosy.

