InvGate Service Management

&

EFECTIVO**Sí**

Case Study   Finances

How financial company EfectivoSí improved their NPS indicators with an audit-ready service structure with InvGate

70 Agents

22 Help Desks

98% NPS achieved

About EfectivoSí

EfectivoSí is a leading financial company in Argentina, dedicated to serving the needs of the unbanked segment of the population. As a multi-product company, it offers financial services to more than 400,000 customers through multiple channels.

Challenge

By the very nature of the financial business, EfectivoSí faces great challenges in the administration of its internal services and technology. In a highly regulated industry where it is essential to guarantee 24/7 service uptime, the teams require effective management tools that allow them to avoid any system failures or security incidents.

The financial industry holds particularly rigorous policies and regulations defined by the Central Bank. As a result, EfectivoSí teams undergo cyclical audits and face the challenge of implementing high-security processes and protocols to safeguard the integrity of the information handled by the company.

In this context, EfectivoSí was struggling to successfully introduce an internal management tool that would prove to be robust, adapt to the organization, and most importantly, be easy to use for internal customers.

Without achieving strong levels of internal adoption, the large majority of the teams continued to channel their requests through e-mail and phone calls.

After two failed attempts, in 2018 EfectivoSí began working with InvGate to implement both help desk and asset management solutions and managed to establish new processes and best practices for the entire organization.

Service Tailoring and NPS

EfectivoSí IT team was the one to take the initial step leading the implementation of InvGate Service Management, defining the workflows that simplified incident management for the organization and provided key performance indicators.

The other teams didn't take long to see the value of Service Management and in a short period of time, more than 22 help desks and 70 agents were up and running, providing service to more than 800 users.

The rapid adoption was a result of Service Management's flexibility to adapt to EfectivoSí's way of working. Each area would completely customize the tool, from the service catalog and approval workflows implemented to the form design to collect information from customers.

EfectivoSí succeeded in leaving behind emails and phone calls as support channels: more than 99% of requests are submitted via self-service after the implementation of InvGate solutions.

With a user-first perspective, **EfectivoSí established the NPS (Net Promoter Score) as a universal metric** to measure the performance of support teams.

Audit Ready Service Management

The complexity of the industry regulations in place means that each area is subject to different mandatory guidelines and each type of asset is regulated and must comply with different security standards: an ATM is not under the same regulatory regime as a server.
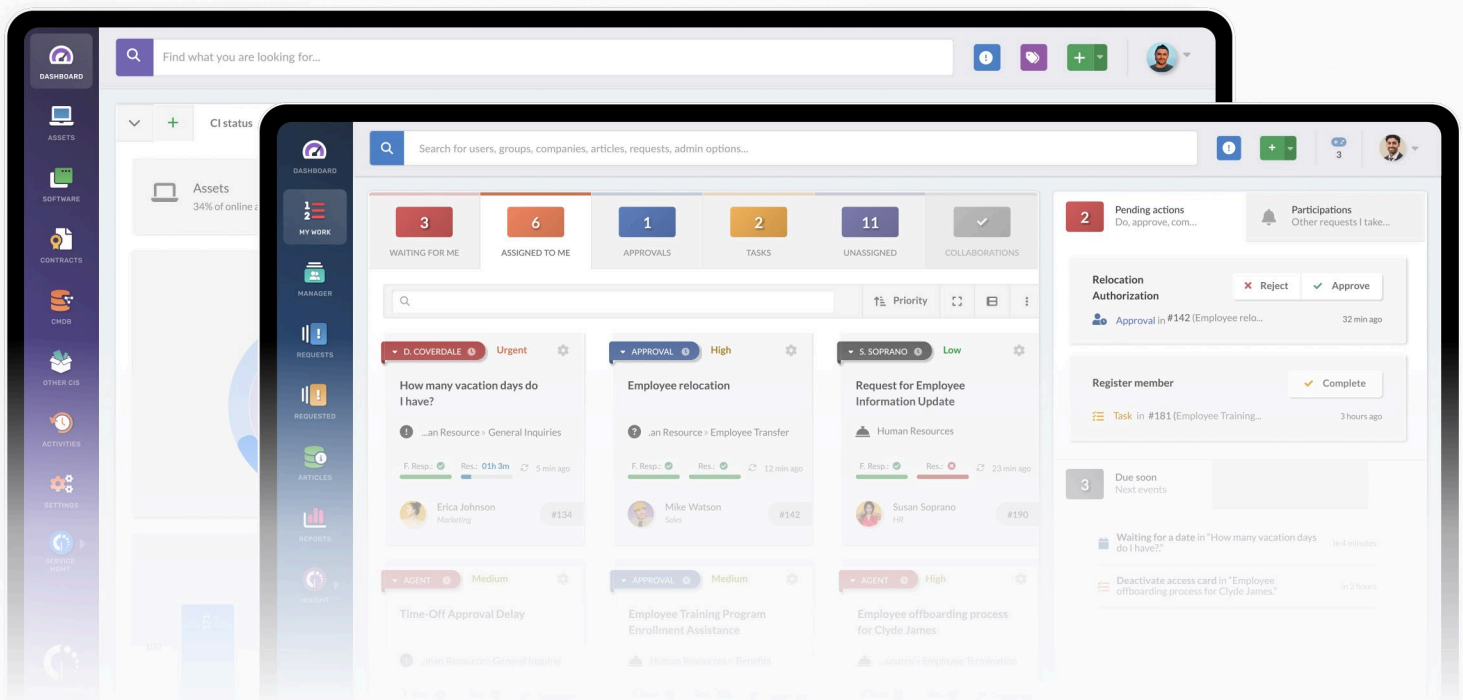
Global leaders trust InvGate

pwc   NASA   TOYOTA   Peoples Bank

It was crucial that the solution could be easily configured to comply with the governance and security standards applicable to each case. With Service Management, EfectivoSí was able to achieve this customization: segmenting access types by user, limiting the services available for each user, and tracking each incident throughout its lifecycle.

Since the company complies with a strict flow of internal, external, and cyclical Central Bank audits, the tool needed to provide end-to-end visibility of its IT infrastructure.

With InvGate, EfectivoSí found the integrated help desk and Asset Management solution that allowed them to account for this regulatory complexity and access reliable, up-to-date metrics of its internal management processes to be always audit-ready.

"In InvGate we found a business partner that accompanies us through every step of our IT operations. I particularly appreciate the visibility into the lifecycle of each incident we gained with Service Management that allows us to implement continual improvements in our processes. Our next challenge is to move our systems from an on-premise solution to the cloud."

Eduardo Ocampo
IT Production Manager

Recognized by the best in the industry