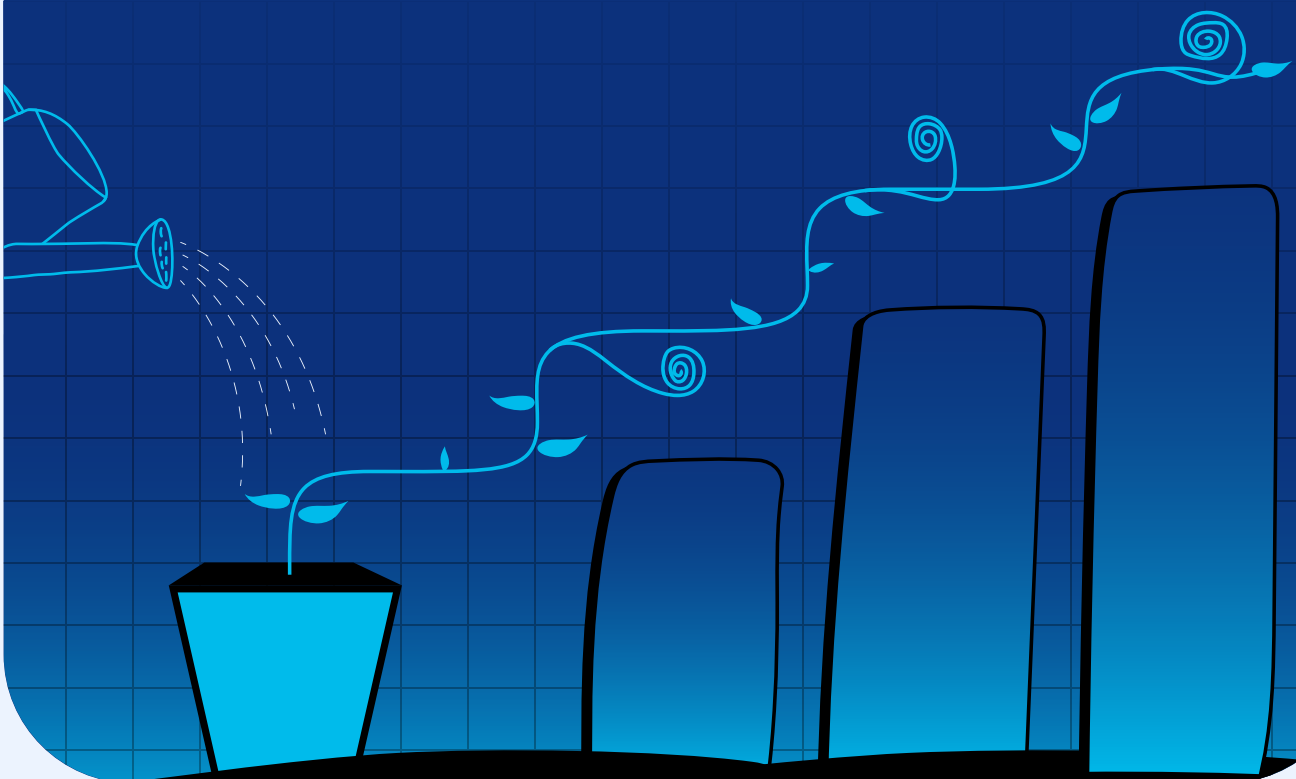


CASE STUDY

Pioneer Insurance selects Zoho Desk to improve its business efficiency significantly



Overview

Pioneer Insurance
successfully resolved

75%

of the tickets the same
day they were opened
using Zoho Desk.

The company

Founded more than 60 years ago, Pioneer Insurance is headquartered in Makati City, Metro Manila.

An all-Filipino insurance company, Pioneer Insurance offers a wide range of innovative non-life and life coverage options. Recognized as one of the Best Insurers in Asia, Pioneer is focused on serving its large customer base with humanity, excellence and integrity.

The challenge

When Mr Earl Ferrer joined Pioneer Life Inc as First Vice President - Digital Transformation in 2019, he was intent on finding a solution to track ongoing tickets and issues. With such a large company, Pioneer needed a robust system the IT team could use to address three key issues.

- It needed to keep track of the status and personnel responsible for each ticket.
- It needed to sort and identify recurring issues, so the team could better address root causes and develop more effective solutions.
- Pioneer Insurance needed to maintain a record of system modifications for future reference. These changes needed to be logged in the system and communicated to the wider team, rather than being implemented on an individual basis.

With a proper tracking solution, Mr Ferrer hoped the team would be able to work collaboratively to greater effectiveness.

Mr Ferrer was particularly interested in solutions that came with capable implementation teams that understood Pioneer's specific needs and goals.

"80 - 90% of functionalities will be similar across competing offerings," he explained. "However, it is important that the implementation team is confident and able to allow us to grow at the pace we want to go, [and] that they do not push us to go big too soon.

The solution

The digital transformation team began searching for a solution that could log problems and change requests, convert items into projects, and sort the subsequent tickets by priority level or category. The ability to provide analytics for process improvement was also a factor taken into consideration. Mr Ferrer acknowledges that most help desk systems come equipped with these functions. But for him, Zoho stood out due to its knowledgeable implementation team and the flexibility of the solution.



Zoho [is] flexible in terms of how we can adjust the system. For us, the adoption of Zoho Desk was very smooth as the implementation team was very familiar with the product and was able to complete the set up quickly.

Earl Ferrer,

First Vice President, Digital Transformation,
Pioneer Insurance

Key benefits and ROI

Zoho Desk is now a major part of operations at Pioneer Insurance and has significantly helped the company improve its business performance. In 2021, Pioneer Insurance logged more than 60,000 tickets in Zoho Desk. Impressively, the company is able to close around 75% of tickets the same day they are opened. With Desk's analytic capabilities, Pioneer's operations teams are able to identify and rectify common issues so that ticket numbers decrease every month.



We found a particular system where 30 tickets were requested [per] month. With this information, we [were] able to identify the root cause of the issue and fix the code that was causing the problem. With this fix, we are able to eliminate permanently 30 tickets a month, and we are replicating this system of identifying and fixing problems throughout our organization. This is the beauty of Zoho Desk for us—being able to analyze the data allows us to bring down our ticket count, allowing our team to focus on one-time issues rather than recurring ones.

Earl Ferrer,

First Vice President, Digital Transformation,
Pioneer Insurance

Zoho Desk allows the team to generate and analyze reports to take a closer look at issues rather than just logging daily tickets. The team at Pioneer Insurance is able to summarize the top tickets every month and resolve persistent issues with a goal of decreasing ticket frequency in the long term.

Looking forward

Pioneer Insurance is looking to create ticketing systems for various departments within the company, from solution support teams to HR. Many of these projects are in the pipeline and the team is looking to automate more processes with the help of Zoho solutions.



Zoho Desk is easy to use and customizable. Businesses who have the capabilities to utilise and [take] action on the wealth of data from the system will find Zoho Desk an important tool to improve their business processes.



Earl Ferrer,

First Vice President, Digital Transformation,
Pioneer Insurance