Capgemini invent | ⌐IVERTY

Revolutionizing Riverty's CRM capabilities with Copilot for Sales

In just nine weeks, Capgemini Invent and Riverty redefined CRM engagement, including integrating Microsoft Copilot for Sales to drive efficiency and innovation in sales operations

Riverty, a global fintech powerhouse within the Bertelsmann Group, specializes in "Buy Now, Pay Later" services, comprehensive debt management, and versatile payment solutions. With a significant presence across Europe and the USA, Riverty processes over one billion transactions for more than 25 million consumers. However, the company wanted to improve customer engagement and operational efficiency. This meant streamlining sales processes and boosting the overall functionality of Riverty's customer relationship management (CRM) platform, which had not been fully leveraged.

In looking for a solution, the company chose Microsoft Copilot for Sales to enhance daily productivity and system utilization. To gain access to the necessary level of expertise for such an initiative, Riverty engaged Capgemini Invent to leverage AI-driven insights and automation.

Client: Riverty

Region: Global

Industry: Banking and Capital Markets

Client Challenge: Riverty faced challenges with fragmented CRM activities and a lack of transparency that slowed its sales processes and the overall CRM system's functionality.

Solution: Capgemini Invent elevated Riverty's CRM with Microsoft Copilot for Sales and Sales Premium, focusing on AI integration, change management, and user adoption to boost productivity and operational efficiency.

Benefits:
- Enhanced CRM user satisfaction by 23%*
- Accelerated retrieval of sales information by 67%*
- Improved CRM functionality ratings by 44%*
- Elevated usage of CRM sales functionality by 33%*
- Increased CRM ease of use by 31%*
- Fostered a more customer-centric approach, improving customer interactions and overall service quality

Leveraging AI to enhance CRM practices

The project spanned nine weeks, during which Capgemini Invent worked closely with Riverty to tailor the integration of Microsoft Copilot for Sales within the company's Dynamics 365 CRM platform. This initiative unfolded in three pivotal phases, ensuring a comprehensive enhancement of CRM functionality and user adoption.

1. Capgemini Invent focused on aligning new AI capabilities with Riverty's strategic business objectives, creating a technology integration roadmap designed to drive significant business outcomes.

2. The partners emphasized ensuring technical readiness and user enablement. Through dedicated technical onboarding sessions and extensive hands-on training, the company's team was equipped to fully utilize Microsoft Copilot for Sales, including meeting preparation, email summarization, and CRM data maintenance. This phase was crucial for a seamless transition and maximizing the adoption of the new system.

3. In addition, Capgemini Invent initiated an upgrade to Microsoft Dynamics Sales Premium, significantly enhancing the CRM with advanced AI capabilities and setting a solid foundation for Riverty's continuous digital transformation.

Throughout this journey, Capgemini Invent's collaborative and strategic approach played a crucial role in Riverty's successful digital evolution. The culmination of this project not only advanced Riverty's technological capabilities but also laid the groundwork for a "Future Way of Work", emphasizing a shift towards more dynamic, AI-enhanced operational processes and work practices.

> The change generative AI can drive around sales processes in a few weeks is eye-opening. We look forward to seeing how we can leverage this technology for new and evolving use cases."

Stephan Quitschau,
Commercial Processes, Riverty

The first step into the future of CRM

The integration of Microsoft Copilot for Sales into Riverty's CRM system marked a significant leap forward in operational excellence and customer engagement. Post-implementation, the company witnessed a 23%* increase in CRM user satisfaction, a 67%* enhancement in the speed of retrieving sales information, a 44%* improvement in CRM functionality ratings, a 31%* increase in the intuitiveness and ease of use of the CRM system, and a 33%* rise in usage of the sales part of CRM.

These KPIs indicate improved operational processes and increased user engagement, driven by the support and enhancements provided by Microsoft Copilot for Sales. The results reflect the project's immediate success as well as Riverty's strengthened position in the competitive fintech landscape.

Building on this foundation, Riverty and Capgemini Invent are now set to deepen their exploration of AI capabilities within Microsoft Dynamics. In particular, the partners will focus on the Sales Premium upgrade to unlock further efficiencies and innovation, not only in sales operations but also for key account and partner managers within the organization. The collaboration's initial success and strategic vision for future advancements mark a significant advance in digital transformation and operational excellence in the fintech sector.
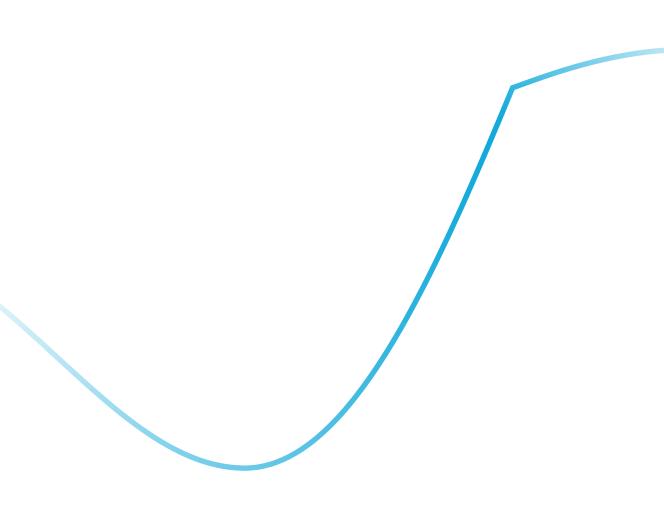
*Based on user survey.

> Embracing the vast potential of AI, we tailor clear, custom solutions to precisely meet each client's unique needs, ensuring the full transformative impact of AI for smarter, more efficient outcomes. Our approach with Riverty exemplifies this, swiftly demonstrating significant value through the implementation of Microsoft Copilot for Sales, directly addressing and enhancing their specific operational challenges."

Marcel Schmidt,
Project Lead & Microsoft Dynamics Expert,
Capgemini Invent

About Capgemini Invent

As the digital innovation, design and transformation brand of the Capgemini Group, Capgemini Invent enables CxOs to envision and shape the future of their businesses. Located in over 30 studios and more than 60 offices around the world, it comprises a 12,500+ strong team of strategists, data scientists, product and experience designers, brand experts and technologists who develop new digital services, products, experiences and business models for sustainable growth.

Capgemini Invent is an integral part of Capgemini, a global business and technology transformation partner, helping organizations to accelerate their dual transition to a digital and sustainable world, while creating tangible impact for enterprises and society. It is a responsible and diverse group of 340,000 team members in more than 50 countries. With its strong over 55-year heritage, Capgemini is trusted by its clients to unlock the value of technology to address the entire breadth of their business needs. It delivers end-to-end services and solutions leveraging strengths from strategy and design to engineering, all fueled by its market leading capabilities in AI, cloud and data, combined with its deep industry expertise and partner ecosystem. The Group reported 2023 global revenues of €22.5 billion.

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