



"We were impressed that Infor could deliver so much out-of-the-box functionality at such a reasonable cost."

—TOM SANTANIELLO, MANAGER, APPLICATION MANAGEMENT, PIONEER INVESTMENTS

ABOUT THE COMPANY.

The investment management subsidiary of UniCredito Italiano S.p.A., Pioneer Investments is a global asset management firm with offices in 22 countries and approximately \$325 billion in assets under management.

For over 80 years, Pioneer Investments has been a leading innovator in the investment management industry worldwide.

From large-cap stock funds to emerging market funds, corporate bond funds, and money market funds, Pioneer's wide selection of mutual funds covers the entire range of the investment spectrum. The firm's flagship mutual fund, Pioneer Fund, is the third-oldest mutual fund in the United States.

PIONEER GAINS INTELLIGENT MARKETING WITH INFOR CRM EPIPHANY

SETTING THE STRATEGY.

The limitations of the legacy reporting system used by Pioneer Investment's US division made it difficult for their executives to analyze sales performance and gain a comprehensive customer view. Tom Santaniello, manager, application management at Pioneer, explains, "We had been living with reporting constraints for a number of years. New reporting requests would have to be sent first to a business analyst and then to a programmer at a vendor site who would then write code to actually extract the data. The turnaround time for designing, coding, and verifying a new report could be as long as several weeks. We wanted the flexibility to ask any question about our customers and transactions that came to mind and obtain an answer immediately."

Additionally, Pioneer required a solution that would be readily accommodated by the firm's IT staff as well as its sales and marketing executives. "Pioneer is a mid-sized organization and does not have a large in-house IT department to support extensive custom development. On the user side, our intended audience included senior sales and marketing professionals who did not have time to master the intricacies of a system with a complex user interface," continues Santaniello.

"Our starting point was to develop an open, analytical database of transaction and channel information. We wanted to know as much as possible about the key distributors of our product so that we could service them more effectively and understand which ones were providing the most value."

GETTING BUSINESS SPECIFIC.

Pioneer began evaluating different ways to make its customer intelligence more accessible and useful. Infor™ CRM Epiphany, was the perfect match. “Obviously, there are plenty of analytical products available, but the Infor solution was a cut above the competition,” says Santaniello. “Infor’s ability to deliver data to end users in such a flexible and intuitive manner placed them at the top of the list.”

Infor CRM Epiphany offers a unique, fully integrated system for delivering business insight to executives, managers, marketers, analysts, and other business users. Its webbased architecture makes the solution easy to deploy, use, and maintain. “We really liked the software’s sophisticated, web-based architecture, and we were impressed that Infor could deliver so much out-of-the-box functionality at such a reasonable cost. If we had tried to develop a comparable solution in house, we would have likely spent more money for a much less flexible and functional solution,” adds Santaniello. Leveraging the stand-alone capabilities of Infor CRM Epiphany’s modularized offerings, Pioneer implemented the Outbound Marketing and Sales modules.



Customer facts:

- ▶ *Company*—Pioneer Investments
- ▶ *Solution*—Infor CRM Epiphany
- ▶ *Product*—Outbound Marketing, Sales
- ▶ *Industry*—Financial Services
- ▶ *Revenue*—US \$525 Million
- ▶ *Country*—USA

SEEING RESULTS.

Infor’s solution enabled Pioneer to manage the marketing process, from campaign management to long-term relationship building. “The Sales module completed the value chain from analytics down to operations and everything in between,” explains Santaniello. “Intelligent marketing has helped us better support our channel partners and further strengthen our relationships with them. “The Outbound Marketing module allows us to conduct targeted email campaigns, track results, and measure the success of our campaigns, which is a huge savings over the direct mail campaigns of the past.”

In addition, the limitations of Pioneer’s legacy reporting system made it difficult for executives to analyze sales performance data and gain a comprehensive customer view. “The Infor solution’s reporting tool saves us a tremendous amount of time in obtaining reports and helps us react faster to situations,” Santaniello says. “If something raises a question, we can investigate further and drill down into the information in real time. This type of ad hoc analysis has been a major boon to management.”

He adds, “We also needed an easy-to-use interface, and Infor definitely delivered. You can’t get much simpler than the Infor solution’s rows-and-columns paradigm. There is no way that we could have rolled out a solution that required users to study a 50-page manual or attend 6 hours of training just to learn how to create a report.



Intelligent marketing has helped us better support our channel partners and further strengthen our relationships with them.

—TOM SANTANIELLO, MANAGER, APPLICATION MANAGEMENT,
PIONEER INVESTMENTS

Without the integrated capabilities of Infor CRM Epiphany, it would have been very difficult to maintain a level of consistency across all touch points.”

In terms of the company’s goal of providing enhanced service capabilities and marketing support, Santaniello explains, “With Infor CRM Epiphany, we can capture every interaction with our brokers for a 360-degree view and make that data available to everyone in the organization. This allows us to eliminate unnecessary contact and provide service in a more efficient and effective manner.”

DOING BUSINESS BETTER.

With Infor CRM Epiphany strengthening customer relationships, Pioneer will continue reaping the benefits derived from a deeper understanding of its customers. Santaniello concludes, “A system as comprehensive as Infor’s allows us to offer better customer support than our competitors. That has added to our credibility within the broker community and enhanced our relationships with them. And, in an increasingly competitive marketplace, these capabilities have allowed us to differentiate ourselves from a marketing support and servicing standpoint, and provided us with strategic advantage.”

THERE IS A BETTER WAY.

At Infor, we work with a core belief. We believe in the customer. We believe that the customer is seeking a better, more collaborative relationship with its business software provider. And a new breed of business software: created for evolution, not revolution. Software that’s simple to buy, easy to deploy and convenient to manage. Our 70,000 customers in more than 100 countries stand with us. We look forward to your sharing in the results of our belief. There is a better way. For additional information, visit www.infor.com.

Infor Corporate Headquarters

13560 Morris Road
Suite 4100
Alpharetta, Georgia 30004
USA
Phone: +1 (800) 260 2640

www.infor.com

The Infor logo consists of the word "INFOR" in a bold, sans-serif font. The letters "I", "N", "F", and "O" are black, while the letter "R" is red. A small trademark symbol (TM) is located to the upper right of the "R".