CASE STUDY

How Credit Agricole implemented procurement software.

A short story of many benefits.

Who?

CRÉDIT AGRICOLE

Credit Agricole Bank Polska S.A.

Credit Agricole Bank Polska is a bank which listens to its clients carefully and builds with them long term relations. The bank offers solutions suited to the individual needs, in good time – starting with a bank account, debit and credit cards as well as a foreign currency account, through a broad range of credits, savings and investment funds, up to the insurance for the clients and their relatives. The bank is one of the leading banks in Poland in terms of offering comprehensive financial and insurance products.

As a universal bank, Credit Agricole Bank Polskaprovides solutions for the individual clients, farmers and agricultural companies, small and medium enterprises as well as international corporations. Its products and services are available in almost 450 bank subsidiaries, 300 credit bureaus and 12 000 partner points of sale as well as on the phone, Internet and by the mobile service CA24.

Credit Agricole Bank Polska focuses on implementing technological innovations and digital solutions which simplify remote access to the services, primarily the bank attaches much importance to the quality of service in direct contact with the client.

The challange

Credit Agricole Bank Polska has decided to improve procurement processes with NextBuy help. NextBuy project team has just finished the process successfully and implemented such modules as:
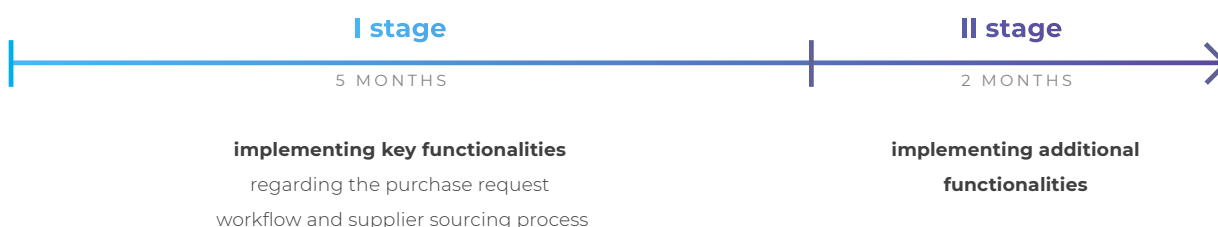
supplier management
MODULE

purchase requests
MODULE

souring and RFx
MODULE

contract management
MODULE

analyses & reports
MODULE

3,2,1…START!

Implementation stages

5 DAYS OF WORKSHOPS

3 workshops were focused on specification –defining business and process needs of the Customer, setting priorities as well as agreeing on the project schedule.

2 workshops were dedicated to discuss the modeled process in the system.

I stage
5 MONTHS

II stage
2 MONTHS

implementing key functionalities
regarding the purchase request workflow and supplier sourcing process

implementing additional functionalities

> It's always a big challenge to collect the data which needs to be implemented into the system, especially when the process has carried out in a traditional way (paper or e-mails)so far. It was necessary to prepare the fields in electronic forms, acceptance process and the list of users.

Damian Czernik
E-procurement Expert

The first stage required a lot of work, both on NextBuy and the Customer side.

This stage included preparing specification which described the whole procurement process realized in the system.

Who participated in the process?

There were 4-5 employees on the **Credit Agricole** side.

NextBuy team included 5 experts.

The result

Today there are **200** NextBuy users in Credit Agricole, actively using:

supplier management
MODULE

purchase request needs

RFx
MODULE

contract management

analyses

NextBuy has also prepared for the Customer **functionalities** related to the supplier management process:

**ATTACHING WEIGHTS
TO THE EVALUATION CRITERIA
BY THE PROCUREMENT TEAM**

thanks to that function, each team member may attach the weight at its own discretion. After that the system automatically counts the arithmetical average of the attached weights for each criteria.

ACCEPTING RFX BEFORE SENDING IT TO A SUPPLIER

thanks to that function there is a limited risk that the RFx which is not agreed with the purchase initiator will be released to the market.

**OFFER EVALUATION
BY THE PROCUREMENT TEAM**

thanks to that function each team member evaluates offers at its own discretion. After that the system automatically counts the arithmetical average of the attached weights for each criteria giving one overall rating for the offer for each supplier.

ACCEPTING RECOMMENDATION OF A SUPPLIER

thanks to that function the final supplier selection is accepted by the designated users.

The functionalities above were necessary to carry out the procurement process according to the procedures.

The challanges

Challange 1

During the pre-implementation analysis it turns out that the supplier evaluation formula according to the Customer procedure is a bit different than the one implemented in the system. Implementing new formula was time consuming and was related to many risks.

Solution

After analyzing the formula by the business analyst, it turns out that the same result of the evaluation may be afforded with a tiny modification in the existing formula implemented in the system. After presenting the solution, it was accepted by the Customer.

Challange 2

During the first stage of the implementation process Active Directory integration was planned. Thanks to the integration all users are able to log in to the system without giving a password. It was necessary to develop an appropriate policy. It made the whole process a bit longer.

Solution

Due to the fact that the appropriate policy of internal and external system integration had to be developed, the kick off of the integration was moved to the 2nd stage of the implementation and realized according to the schedule.

We are trying to be flexible and open to the Customer needs during the whole process.

> I consider working with NextBuy and the whole implementation process really positive. Our partner presented a flexible attitude and reacted on each change very quickly. It was particularly important to us as we as a bank want to answer all our clients' needs too. Thanks to NextBuy we have automated the procurement process and shortened the time for executing the orders. All of that with the reasonable costs of implementation and the system fee.

Jarosław Pazdro
Head of Procurement
Credit Agricole Bank Polska S.A.
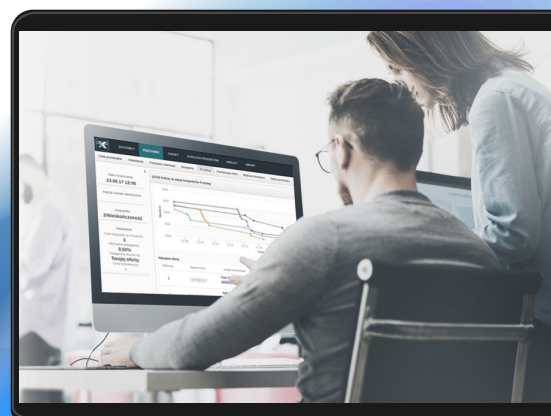
If you want to join procurement experts who already use NextBuy,

schedule a free demo.