

# Crédit Agricole en Bretagne

Top European financial organization  
supports operational excellence  
with process mining.

Transform Process Into Advantage



## A Loan Challenge

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One specific process optimization use case was related to the home loan business sector. Increasing pressures from competing organizations in the sector had been resulting in Crédit Agricole en Bretagne losing customers and winning a smaller share of new customers. In trying to understand how and why this had occurred, the operational excellence group first had to understand how the home loan process was working.

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**Eric Rousselin**, Director of Crédit Agricole en Bretagne

### CRÉDIT AGRICOLE EN BRETAGNE AT A GLANCE

Over

**1.7M**

customers

Nearly

**5,000**

employees

Specializing in:

**asset management**

**lending**

**wealth management**

**real estate investment**

With over 1.7 million customers and almost 5,000 employees, Crédit Agricole en Bretagne is the top asset manager in Europe, the number one lender to the French economy, and the leading real estate investor in France.

### Operational Excellence



**No. 1 asset manager in Europe**



**No. 1 lender to the French economy**



**No. 1 real estate investor in France**

With four different regions, each operating differently, it was tricky to pinpoint exactly where the problems occurred, what might constitute best practice, and how to both improve the process and to share that best practice around the regions.

The team identified that the only way to accurately examine what was happening in a process that was heavily systemized was to consider process mining technology.

## The Right Choice for Process Mining

Factual data would inform recommendations, but this data existed within, and across, multiple applications. Getting an accurate picture of what was happening and how the process worked required a more sophisticated approach to process mining.

Though part of their systems resided within a Bonitasoft BPMS-based application, other tools were home grown. Because of the unique nature of the tools, they were not suited to a simple out-of-the-box process mining solution and required flexible easy-to-create custom connectors.

As part of the search for the right process mining solution, the organization and its leadership had specific goals in mind.

The activities in their home loan process occurred in parallel or concurrently. When evaluating potential solutions, Crédit Agricole en Bretagne identified Process Explorer 360 as uniquely capable of addressing those needs.

### **BIG BENEFITS WITH PROCESS EXPLORER 360**

Leveraging Process Explorer 360, the team gained the ability to:

- Capture accurate details of how the current process is working.
- Identify both opportunities to improve processes in each of the regions, and areas where they can start to standardize the process to gradually reduce differences.
- Consider which parts of the process might benefit from a shared services approach.

### **PROCESS EXPLORER 360 ADVANTAGE**

- The flexibility and connectivity of Process Explorer 360 meant that the team was able to connect and extract data from disparate systems, most of which were home-grown and developed over many years.
- Because Process Explorer 360 was able to handle concurrent or parallel activities occurring as part of the home loan process, the team could better understand the reality of the way they work.
- Simple, easy-to-understand visuals, combined with business-friendly dashboards meant that the team could not only analyze their processes, but share insights in an intuitive manner with management and stakeholders.



We want to improve our processes by removing bottlenecks and optimizing our lead times,” said Eric Rousselin, Director of Crédit Agricole en Bretagne. “The recent announcement of the iGrafx acquisition of Logpickr and Process Explorer 360 for process mining reinforced our belief in investing in a future-proof solution.”

The three advantages that most attracted Crédit Agricole en Bretagne to the solution were:

- **The potential of the solution**
- **Geographical proximity of the company**
- **Easy handling with the technology of concurrent tasks**

While they had identified several potential solutions, many were either too expensive, focused on package solutions, or were unable to provide native language support. Process Explorer 360 is a cost-effective solution that was easily able to manage the capture of processes spanning multiple departments, systems, and stakeholders. Process Explorer 360 also proved itself more than capable of easily connecting to their custom systems and standard workflow automation tool, Bonitasoft.

## Going Forward

After realizing the value of Process Explorer 360 within four weeks, Crédit Agricole en Bretagne have plans to apply Process Explorer 360 to a wider range of processes with the organization to broaden their improvement capability.

Additionally, the team is moving from an analysis phase to a monitoring phase, where they can keep an eye on drift and ensure greater compliance with the new ways of working. Initiatives are in place to be able to undertake continuous process improvement via the Process Explorer 360 alerting and notification system.

Comprehensive business process management starts with the deep discovery of existing systems. Equipped with this knowledge, all interactions can then be mapped back to the intended design. With iGrafx Process Explorer 360, businesses like Crédit Agricole en Bretagne gain a more holistic approach to process improvement.

Visit [iGrafx.com](https://www.igrafx.com) to learn more about the iGrafx Business Transformation Platform today.

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