

Costa Rica, San Isidro del General  
16 September 2021  
**GG-2553-2021**

#### TO WHOM IT MAY CONERN

Coopealianza is a Costa Rican credit union with over 50 years of experience in Costa Rica's financial sector, focused on consumer products. We hold over 940M USD in assets, 50 branches, as well as the strongest associate base on the Costa Rican credit union sector, with over two hundred thousand associates.

In the period between July 2017 and June 2018, we developed two stages of project "CRM Coopealianza", alongside London Consulting Group. Project "CRM Coopealianza" focused on building the foundation of the customer service and customer onboarding processes in our organization through the definition of the required processes, and the selection, and implementation of Oracle's CRM Customer Experience tool.

Change management, team dedication, side-by-side implementation, and the methodology implemented through the project phases were all key to achieve an implementation 30% faster than the implementation partner's standard times as well as an implementation coverage of 100% on our branch commercial team and service areas. The implementation of this tool proved to be a cornerstone of our commercial and service processes. Some of the main achievements were:

CRM development and implementation model:

RFP definition and optimized process design:

- Analysis of the core short-, mid- and long-term requirements for sales prospecting administration and management.
- Sales management model definition. Established the commercial process, activities and deliverables for each process stage, serving as the fundamental structure used to standardize the commercial CRM process.

Tool evaluation and selection:

- Creation of the Functional Specific Requirement (FSR) detailing the optimal commercial process to implement.
- Evaluation of different CRM alternatives. Selection of Oracle's Cx Customer Experience platform, by applying a thorough evaluation model comparing each tool's potential, and the alignment to current requirements, the integration capabilities to the banking core and the project's ROI evaluation.

Project PMO:

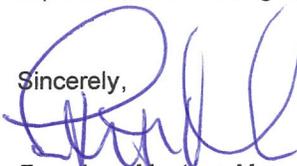
- Follow up and support during the development of the Customer Experience platform parametrization, reducing the average implementation time by 30% (compared to similar projects on financial institutions).

Training and implementation:

- Training and implementation of over 250 employees on the CRM platform use: sales consultants, door to door executives and call center consultants.
- User certification by applying usage audits and implementation evaluations, guaranteeing a 95% compliance to the Sales Administration Model on the CRM.
- 50% improvement on sales steps time goals compliance, optimizing credit application response times.

I am therefore pleased to recommend London Consulting Group as a consulting firm that helped us define, evaluate, and choose an adequate technological tool that allows us to improve our commercial process, and for their side-by-side implementation ensuring its adoption.

Sincerely,



*Francisco Montoya Mora*  
**General Manager**