

Our Client:

Our client for this case study is a major bank with over 1000 outlets and 4 million customers in South Africa and Europe. The bank's business lines include corporate and retail banking, property finance, investment banking, private banking and bancassurance.

The Need:

The bank had implemented a major CRM solution over several years, and was considering upgrading and extending CRM throughout the wider organisation. Acceptance and benefits of the solution, however, had not been up to expectations. Customer Connect was engaged to undertake a review of the effectiveness of the CRM solution deployment across management, functional and technical dimensions, and to recommend the best way forward.

Why Customer Connect Australia?

The bank selected Customer Connect Australia due to the following:

- Depth of experience with the major CRM system in question.
- Independence; no contractual or commercial relationships with CRM system vendors.
- Structured, evidence-based approach to conducting the review.

The Engagement:

The engagement comprised the following major activities:

- High level situational review encompassing business priorities and drivers, business processes, people and competencies, systems and information.
- Review of program governance structures, methodologies, deliverables and measures.
- Alignment with CRM best practices, at both a business and program level.
- Presentation of recommendations, highlighting opportunities to achieve maximum benefit from CRM across the organisation.

The Result:

The engagement was completed on time and budget. The feedback presentation covered:

- Statement of current situation, including strategic, people, process and system issues.
- Critical success factors for CRM in the organisation.
- Quantified assessment of CRM system including usage rates, costs, degree of under-utilisation and unsupported business requirements.
- Best practice recommendations.
- Specific recommendations for strategy, people, process and technology.

Client Feedback:

Business: "Thank you for your valuable insight and advice. You have helped to lay a foundation on which we need to now build".

IT: "...the engagement provided valuable insight into the direction that we should be taking as an organisation, as opposed to the 'project' tactical view that we currently adopt".

Engagement rating: Exceeded Expectations.

Average Satisfaction: 96.7%

