

One View of Customer Industry Super

Case study

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Our Client:

NGS Super (NGS) is the industry super fund for non-government and community-focused organisations. NGS serves over 100,000 members across all states of Australia through a dedicated group of Customer Relationship Managers and a central member and employer call centre. As a niche fund operating in an increasingly competitive and constantly changing sector due to legislative change, industry consolidation and increasing customer expectations, NGS recognised the strategic imperative to differentiate itself based on a singular focus on customers. In 2013 NGS embarked on a comprehensive “Customer Intimacy” program to enhance the organisation’s capabilities across a wide range of customer management disciplines including, customer experience design, value proposition development, staff competencies and its customer systems and technology.

The Need:

Historically, NGS’s customer information was held in a variety of standalone legacy systems and spreadsheets, with each department having its own separate knowledge of the customer. In effect there was no consolidated corporate level knowledge of NGS’s members or employer accounts. This resulted in a lack of coordination, disjointed communication across channels and lost opportunities to proactively build customer relationships. Customer Relationship Managers were also faced with managing two systems with different data in order to conduct their routine employer visits and member appointments, often having to replicate data. Financial Planners had no visibility of past correspondence or meetings nor were there mechanisms in place to capture leads or keep others informed of the status of plans for members. Furthermore, marketing where unable to respond quickly and in a targeted and relevant manner to changing market conditions or events, due to the fragmentation of customer information.

Providing a single view of a customer’s relationship and interactions across all areas of the business was therefore seen as a critical foundation stone for the overall CI Program, along with some basic operational CRM capability. By enabling a single source of truth for CRMs, Marketing, Service and Financial Planners, NGS believed it would achieve a common understanding of customers across the organisation and support a consistently positive customer experience.

(continued)

NGS’s customer information was limited to account transaction data and only available to a small group of Relationship managers.

“This has been the most robust, well managed project that we have undertaken.”

“I am so excited about what I can now achieve for our members”
(Marketing Coordinator)

This has made my job so much more effective and my customers really appreciate how well informed I am”
(Customer Relationship Manager)

I can now see the entire relationship the member has with NGS which helps me understand how to talk to them when making appointments.”

(Financial Planning Coordinator)

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The Result:

Customer Connect Aust. assisted NGS through a structured process to understand its technology needs, evaluate suitable technology solutions and then led the design, development and implementation project; named 1VC (One View of Customer). This took the form of a highly collaborative approach involving customer process and experience re-design, numerous design workshops and communication sessions with staff and management. A broad cross section of NGS staff along with NGS’s long term technology partner were involved in the project, which was acknowledged as critical to its success. In early September 2014, NGS launched 1VC following a comprehensive training program for all staff including Relationship Managers, Financial Planners, Marketing and Executive Management.

A Post implementation review was conducted in Nov 2014 to understand the degree of acceptance and business impact and to identify areas that needed support or correction. The results of the review were very encouraging with a high degree of goodwill being expressed. Usage and acceptance across the business was found to be very strong, with CRMs especially highlighting that 1VC has improved their ability to be much more relevant and proactive.

The introduction of 1VC has also allowed NGS to build consensus on standard processes across all of its offices, which has enhanced teamwork and knowledge sharing as well as

improved management outcomes.

Further work is planned for 2015 to deliver more sophisticated capabilities and even further integration of information.

Why Customer Connect Australia?

CCA was chosen after a detailed, transparent process based on:

- CCA’s structured approach to Customer Relationship Management (CRM).
- A proven track record in delivering CRM programs
- Ability to provide strong leadership whilst relating to our people.
- Their commitment as a long term partner. *“We specifically chose CCA because of their willingness to stay with us for the long haul and not make idle promises”*

Client Feedback:

NGS found CCA’s knowledge and approach to be excellent;

“This project has been the most robust and well managed project that we have ever undertaken. CCA’s attention to detail and collaborative approach is fantastic. We could not have achieved so much without them.” (Operations Manager).