



Customer Success Story



Customer Satisfaction Rating:

5
out of
5





Nr 1 with CustomerOne

Serving our customers better with Salesforce



CUSTOMER OVERVIEW

Absa Group Limited (ABGL), formerly Barclays Africa Group Limited, and originally Amalgamated Banks of South Africa, is an African based financial services group, offering personal and business banking, credit cards, corporate and investment banking, wealth and investment management as well as bancassurance. ABGL is the majority shareholder of 11 banks spanning Botswana, Ghana, Kenya, Mauritius, Mozambique, Seychelles, South Africa, Tanzania (two entities), Uganda and Zambia. The group maintains representative offices in Namibia and Nigeria

CUSTOMER COMPANY PROFILE

LOCATION:	South Africa
EMPLOYEES:	3500+ users
INDUSTRY:	Financial and wealth
Solution(s):	Service Cloud, Sales Cloud, Financial Services Cloud, Salesforce Industry Products
GO LIVE DATE:	04/01/2020

Challenge

- “Colleagues use inconsistent, non-standard processes, further complicated by siloed systems. This means they cannot collaborate efficiently across teams, resulting in poor customer experiences and in Bankers deviating from focusing on sales. This is compounded by a lack of easy analytical data for business and management insight. Fragmented and unintegrated systems become a roadblock for a holistic view of customer data.”
- Only a small percentage of clients provide survey feedback.
- Survey questions do not add value, therefore is not useful.
- Manual tracking of activities with customer, leads to inaccurate, untrustworthy data.
- The current questions to customers are not consistent across all channels.
- Users must swivel to different systems in order to process and add a beneficiary, make a 3rd party payment, proof of payment, to provide a copy of a natis document and to make a travel notice on a credit card.
- The Execution of the customer service is not standardised and repeatable.
- Systems are siloed and not integrated to support an efficient and holistic customer service.
- Limited (or non-existent) team collaboration to solve customer issues across channels and groups.
- The monitoring and management is limited because of low accessibility to data.

Solution

- Case management
 - **Vision:** to enable bankers with a single customer engagement platform which leads to improved customer experience
- End State for ABSA**
1. Enable a single relationship management tool across relationship banking.
 2. Enable ABSA to service customers from a single platform across different channels, for private or business needs (voice & physical)
 3. Full end-to-end integration with all product systems to enhance both ABSA and customer experience

Results

- Case management will allow our bankers to record, track, and solve customer issues across service and support. This allows them to use a centralised location for handling cases, connected directly to the customers accounts and associated contact information.
- This gives actionable feedback and insight that can be resolved, instead of just patting our own back.
- Increased accountability.
- More realistic questions to make decisions on staff performance and value drivers.
- Cost effective – saving time and money with better productivity.
- Better Insights.
- More efficiency in executing the jobs therefore more focus on other activities such as building relationships with clients.



Additional Detailed Information and Quantitative Results

Optional Commentary and Notes about Details of Deal or Implementation



Quantitative Results if Available

- Increased Consultant and Banker efficiency by 40%
- Decreased the use of redundant systems and processes by 10%
- Increased 360 view of clients by 60%
- Replaced a system that was making a loss (Customer View) - Financial benefit and cost savings
- Automated processes by 25%



Additional Detailed Information and Quantitative Results

Optional Commentary and Notes about Details of Deal or Implementation



Additional Details

Competitors of Salesforce engaged in sales cycle:	Microsoft AX
Previous technology replaced by Salesforce:	Siebel, ESP, Customer view, FBSS, E-Gain,
Salesforce products deployed:	Service Cloud, Sales Cloud, Financial Services Cloud
Customer Business Model (B2B, B2C, or Both)	B2B and B2C
Salesforce Product features:	Comprehensive Sales Forecasting, Dynamic Dashboards and Custom Reports, Mobility, Opportunity Management, Lead Management, Activity tracking, Routing, Automation
If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.)	Customer Support, Call Center, Field Service, Telesales, Macros, . Milestones, Chatter, Chat, Escalation Rules, Automation rules, Field harvest, Activity tracking, Reports and Dashboards, Routing, Case Queues, Web-to-Case, Email to Case.
Integrations:	CIF, Data Power, Jitter-Bit, Telephone Banking, XDS, CTI, CAMS, Express, Outlook.
AppExchange Apps/Partners	