



The 5 point check: Does your CRM solution enable business resilience?

By Gary Stocks and Yeshaav Naamdheav

As the South African economy re-starts, business leaders are fostering resilience during what is expected to be a slow recovery. The priority across industries is to retain customers, many of whom turned to digital channels during lockdown. Yet, the extent to which digitisation will stick in South Africa is uncertain.

Data affordability and habit are likely to push many customers back to traditional face-to-face channels, forcing organisations to service customers – who now have higher expectations for responsive and empathetic service – across a multitude of channels. This begs the question: is your CRM solution ready?

Many organisations have some form of CRM solution in place, usually in a single functional area, either Marketing, Sales, Service or Customer Support. The higher expectations of post-COVID-19 customers will test the resolve of these solutions, many of which are rudimentary at best.

Expectations of post-COVID-19 customers are higher and businesses must adapt to meet them

To test the resilience of your CRM solution, ask yourself these five key questions:

1. Does your CRM solution enable empathetic customer service?

When customers interact in person, whether speaking to an agent or visiting a physical branch or store, they expect empathetic interactions. Many are now more comfortable with digital channels and expect the same level of empathy from those channels. CRM solutions must enable empathy by providing the necessary customer context and insights to agents in an accessible manner. Customers will remember their interactions with your organisation long after the pandemic passes, use

this opportunity to build personal interactions with your customers to understand how their situation and needs have changed.

2. Does your CRM solution support customer interactions across devices and channels?

Digital channel interfaces have typically developed separately from contact centres and physical branches or stores. CRM solutions must include process management and automation to ensure customers have a consistent experience across all channels. This can be done by understanding your customer journeys across different channels and devices – put yourself in your customers' shoes and map their journeys to understand where opportunities for improvement exist and where the various experiences differ.

Make sure you understand your customer journeys across channels

3. Does your CRM solution link to a single view of customer?

This is not a new requirement, but it is one that has often been compromised in practice because connecting data across functions and systems seems to be an insurmountable challenge. Post-COVID-19 customers will ultimately return to physical branches and stores, but

they are also likely to use mobile devices in those spaces to limit physical contact because of physical distancing requirements. CRM solutions must ensure in-store agents have all the facts on-hand when interacting with those customers.

Post-COVID-19 customers will likely adopt a hybrid interaction model

The single view of customer is always changing, but now is a better time than ever to collaborate across the organisation to understand what data is needed for this view. Once you know what data is needed, the phased integration of the various data sources can begin with a focus on ensuring the longevity of this view across interaction channels. To do this, the customer's online profile must match their in-store and telephone profiles and as updates are made to one profile, they are reflected across the others.

4. Does your CRM solution protect sensitive customer data, while leveraging it for insight?

Increasing use of digital channels, as well as employees working from home, has increased the volume and frequency of customer data flowing outside the organisation's firewall. This data must be protected. Organisations with a track record of protecting customer data will consistently gain consent for it to be used for insight, which will enable personalisation of engagement and offers. The pandemic presents its own challenges, when it comes to ensuring data compliance, given the rapid shift to a predominantly work from home (WFH) arrangement undertaken by most organisations at the outset of the lockdown ([read more](#)).

5. Does your CRM enable your team effectively?

The experience and engagement level of your agents has a direct impact on customer experience. The ease of use of your CRM solution, particularly in a WFH situation, will affect that experience. CRM can conveniently enable employees to log tasks, create workflows and centrally manage actions when responding to customers within defined service levels.

The experience of your customer service agents directly impacts that of your customers

While healthcare workers continue their stellar work on the front lines of the COVID-19 pandemic, it is now time for economic workers to do our bit by ensuring customers are able to adapt to a new way of doing business. A well implemented and integrated CRM solution is one of the key enablers of economic resilience and recovery. But, implementing it requires strategic leadership, collaboration across business units, and empathy towards employees, customers and suppliers, all supported by integrated, intelligent systems.

We are in this together, and together we will emerge stronger.

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We have more than 20 years' experience across the banking, specialised financial services, insurance, healthcare, telecommunications, and oil and gas sectors. By employing a multi-skilled approach, BSG effectively leverages our clients' data to create solutions that improve the experiences of their customers and solve enterprise-scale challenges.

We understand the dynamics of Business and Technology, which allows us to create flow between supply and demand, bridging the gap between business and IT. We work with our clients to drive out success, transforming their operational platforms and creating the customer experiences they need.

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