

Client success story: Sanlam Reality

Program Type: Loyalty

Industry: Finance

Participants: 150 000

Budget: R100+ Million

CREATING A WINNING PLATFORM FOR HEALTHY CUSTOMER RELATIONSHIPS

For insurance providers, a wellness-based loyalty program is a uniquely natural fit. Members get the physical and financial benefits of healthy living and insurers get an open door to customer dialogue and data. It's a win-win relationship that's been working well for this major insurance client. Here's how we kept the loyalty relationship growing.

The challenge

We developed the client's existing loyalty program, which had been running for 8 years with periodic enhancements. For the latest enhancement, the client wanted a more comprehensive overhaul to better leverage cross-sell and up-sell opportunities across their range of financial services. To achieve this, we needed to increase member touchpoints, improve data collection and maximise opportunities for customer analytics.



The solution

Working in close collaboration with the client, we redesigned and relaunched the program, which had grown significantly over time.

- Designed and developed real-time integration with 10 benefits partners and expanded the rewards suite
- Established a first-stop call centre and administration hub. An initial team of 13 agents handled thousands of daily queries with 24- to 48-hour response time
- Developed a loyalty platform and database to house over 2 million client portfolios. Systems were scalable for future growth
- Created a purpose-built CRM system to manage and house all member queries, resulting in incisive and targeted handling of member interactions
- Expanded member communications to include system generated welcome messages, reminders, birthday greetings, transactional text messages and program emails
- Created a program to collate and feed program benefit usage data into the client's business intelligence repository. The information assists cross-and up-selling efforts
- Developed real-time look-up into company systems, making it fast and easy to make up-to-the-minute client record updates, as well as enabling live new member acquisition
- Introduced on-going enhancements including a state-of-the-art tiering system and points calculator.

The program comprised:

- Relaunch planning, design and delivery
- Contact centre and administration hub
- Purpose built CRM system
- Systems integration with benefits partners
- Scalable loyalty platform and database
- Automated member communications
- Bespoke systems development
- Tiering system and points calculator.

RESULTS

From the start, the program maintained a steady growth in membership, with very low attrition.

- <5% member attrition
- 10 current benefit partners
- 1.5m+ contact centre engagements
- 98% consistent adherence to contact centre service levels
- 2.5m+ targeted communications sent
- 100+ client program reports generated monthly
- 4bn+/-records processed.

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