First Technology Group

Customer Success Story

Transforming Client Engagement

How Sasfin streamlined data management and enhanced client insights with a tailored CRM solution

sasfin
beyond a bank

Customer Challenge

Sasfin provides a comprehensive suite of specialist financial products and services, focusing on entrepreneurs, corporates, institutions, and high-net-worth individuals. With three key business pillars - Asset Finance, Business & Commercial Banking, and Wealth - Sasfin achieved R1.33bn in earnings in 2022, cementing its position as a leading player in the financial sector.

Sasfin faced challenges with fragmented data systems across its regional offices, limiting its ability to effectively capture, collate, and manage client information. These inefficiencies hindered client engagement and made it difficult to gain meaningful insights into customer preferences, needs, and opportunities. To stay ahead, Sasfin needed a cohesive solution to improve data management, streamline operations, and enhance client understanding.

The Solution

Robust CRM Solution
The CRM Team (part of First Technology Group) partnered with Sasfin to develop a robust, end-to-end CRM solution tailored to their unique challenges.

Consolidation and Seamless Onboarding
Consolidating data from multiple regional offices whilst improving onboarding processes across customer service, compliance, and risk management.

Automatic Insight Identification
Providing actionable insights to identify new opportunities for growth and client engagement.

> "The right technologies enable us to keep the client at the core of everything we do."
>
> Alex Elsworth, CTO at Sasfin Wealth

The Results

Data Consolidation and Enhanced Document Management
Sasfin's information is now unified across all regional offices, and significant improvements in the handling of, and access to, critical documents has been achieved.

Streamlined Onboarding
A seamless onboarding process enhances client experiences and operational workflows.

New Opportunities
Revenue growth is being driven by the highlighting of both up-sell and on-sell opportunities.