Transforming client engagement

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

sasfin

CUSTOMER SUCCESS STORY

Customer challenge

Sasfin is a leading financial services provider offering specialist products and services to entrepreneurs, corporates, institutions, and high-net-worth individuals. With three core business pillars (Asset Finance, Business & Commercial Banking, and Wealth) the group achieved R1.33bn in earnings in 2022, cementing its role as a key player in the South African financial sector.

However, fragmented data systems across regional offices made it difficult to capture, collate, and manage client information effectively. These inefficiencies hampered client engagement and limited Sasfin's ability to gain actionable insights into customer preferences, needs, and growth opportunities.

The solution

The CRM Team, part of First Technology Group, collaborated with Sasfin to design and implement a robust, end-to-end CRM system tailored to their requirements.

The solution consolidated client data from all regional offices into a single, unified platform, improved onboarding processes across service, compliance, and risk teams, and provided actionable insights to identify both new revenue streams and opportunities for deeper client engagement.

The system also enhanced document management processes, ensuring critical information could be accessed and handled more efficiently.

"The right technologies enable us to keep the client at the core of everything we do."

Alex Elsworth | CTO at Sasfin Wealth

The results

- **Unified data:** Consolidated information across all regional offices.
- **Streamlined onboarding:** Enhanced client experiences and operational workflows.
- **Better document management:** Significant efficiency gains in handling critical records.
- **Revenue growth potential:** Uncovered new opportunities for client engagement and sales.